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Report Highlights:
Many of the general statistics are updated, including rankings for top players in both the retail and food service market segments. The impact of recent food safety issues continues to have unprecedented influence on trends in the market. Prospective exporters are encouraged to follow regulatory changes in the Japan food market. Opportunities continue to grow in the health, nutrition and organic food products segments, and for convenient processed food and beverages of premium quality.

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U.S. FOOD EXPORTER'S GUIDE TO JAPAN

Building Position in the World's Largest Market for Imported Consumer Food Products

U.S. Agricultural Trade Office, American Embassy, Tokyo
U.S. Agricultural Trade Office, American Consulate-General, Osaka

2004

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U.S. Agricultural Trade Offices, Japan

A Message from the U.S. Agricultural Trade Offices

Welcome to Japan, the world's largest market for imported consumer food products and the largest overseas market for U.S. food and agricultural exports! We look forward to working with you in this dynamic market.

To assist you, we at U.S. Agricultural Trade Offices (ATOs) have prepared this Exporter's Guide, the emphasis of which is on high-value consumer foods and edible seafood products. Its objective is to provide clear, helpful information to U.S. companies that export, or plan to export, to Japan. This guide is organized into four sections and an appendix as follows:

- **Market preview**
  A brief description of the huge market opportunity that Japan represents, and how U.S. exporters may best fit within it.

- **Exporter business tips**
  A few practical ideas on competing in this market.

- **Market sector structure and trends**
  How food products move through the distribution system to the Japanese consumer today and how these channels may change in the future.

- **Best high-value import prospects**
  Some of the hottest current import prospects in Japan.

- **Key tables and appendixes**
  Tables and charts to provide information on the Japanese food market and economy, and lists of contacts, potential customers, and other useful information.

To those exporters who are new to Japan, we believe you will find this guide invaluable as a starter kit to participation in this dynamic market. To those who are old Japan hands, we believe you may also find useful information here that you may not have previously considered.

We invite you to contact our offices in Tokyo and/or Osaka if we can assist you in building your Japanese business in any way, or if you have questions or comments on this guide.

Gambatte Kudasai!*

U.S. Agricultural Trade Offices in Japan

***Good luck (or technically in Japanese - "Do your best!")**


China
Russia
N. Korea
S. Korea
SEA OF JAPAN
Sapporo
Hokkaido
Honshu
Chugoku region
Sendai
Niigata
Tohoku region
Kanazawa
JAPAN
Tokyo
Mt Fuji
Yokohama
Kyoto
Nagoya
Okayama
Hiroshima
Kobe
Osaka
Kita Kyusyu
Fukuoka
Matsuyama
Mt.Aso
Kanto region
Chubu region
Kinki region (Kansai)
Shikoku
PACIFIC OCEAN
Kyushu
Naha
Okinawa
Ogasawara Island

Table of Contents

I. Market Overview

Japan continues to represent one of the best opportunities in the world for U.S. exporters of food products. Do not be turned away by what you may have heard about recession, unemployment, closed markets, distribution problems, etc. If you have a quality product that meets the needs and wants of the Japanese consumer, which can be produced and delivered competitively, and you have patience, you can build an attractive market position in Japan!

Japan's market for high-value foods and beverages continues to change dramatically. While the impact of low growth in Japan for more than 10 years and two recessions in recent years has left highly visible scars on the overall economy and throughout the food industry, the Japanese import market has remained strong, distribution has become simpler and more direct, and opportunities for creative marketers have increased. The difficulties of the past decade notwithstanding, with the economic recovery now gaining steam, the prospects for the consumer food and beverage market look brighter over the next five years. The Japanese consumer has emerged from the past decade willing to pay extra for quality, although in smaller portions. The food service sector, particularly HMR, is expected to see stronger growth, in line with demographic and social changes (e.g., higher consumption of precooked and premixed meal preparations with more working women and single households). Both overall retail sales and sales to food manufacturers are expected to return to healthy growth. While still lagging the export-led industrial sector, consumer spending has registered growth in the past four quarters.

Although many trade barriers have eased, against the backdrop of a string of recent food safety and labeling issues since both BSE outbreaks in both Japan and the United States, the importance of safety-oriented marketing efforts are further intensified. A growing number of retailers now feature in-house traceability systems. Implementation is mandated by the Government for domestic beef by December 2004, but many chains have developed their own systems ahead of schedule. Similar approaches have been developed for fresh produce and imported beef from Australia, farm-raised salmon, and other products. Within this climate, the Japanese consumer's image of domestic foods has improved against that of imports. Recent surveys have supported this observation. This assessment represents a major challenge for promoting U.S. foods, even though the trade generally understands and trusts U.S. food safety systems.

While it is certainly true that Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) works actively to support the interests of Japanese farmers, since 1990, food imports in most categories have risen while Japanese agricultural production has declined. As a result, the country's self-sufficiency rate has declined as Japan has become more, not less, dependent upon food imports, although the decline has leveled off in recent years. Note the following:

Changes in Japanese Food Imports and Self-sufficiency

	1992	2003		Change
Food Imports	JPY bil	JPY bil	US$ bil	
Consumer-oriented food	2,163	2,329	20.1	8%
Edible seafood	1,557	1,445	12.5	(7%)
Total consumer food	3,720	3,774	32.6	1%
Self-sufficiency Rate[1]	46%	40%		(6%)

[1] Domestic food production as a share of total consumption - calorie basis.
Sources: World Trade Atlas; Japan Customs; Ministry of Agriculture, Forestry and Fisheries (MAFF).

* In this guide we will quote most statistics in Japanese yen, because year-to-year changes expressed in dollars can distort those differences. In any comparison, we will also show comparable dollar figures for the latest year so that readers can easily understand the magnitude of the statistic expressed. Actual average exchange rates are given in Figure 5, Section V.

The Ministry of Agriculture, Forestry and Fisheries reports that Japan's self-sufficiency rate stood at 40% in 2003, where it has remained unchanged for six consecutive years.

Japan's GDP growth has indeed been anemic since the 1990s. In 1992 per capita GDP was JPY 3.87 mil, and in 2002 it reached JPY 3.94 mil (US$ 31,300)*. However, the economic climate points to a weak recovery. Seasonally-adjusted real GDP growth rate for the first three quarters of 2003 was 1.9% (Jan-Mar), 3.5% (Apr-Jun), and 2.2% (Jul-Sep), respectively. GDP growth in the fourth quarter of 2003 reached 7% (annual basis), the highest level in 13 years. Calendar year growth in 2003 at 2.3% was well above the ten-year average of 1.2%. In the past month, the yen's rise has stabilized and GDP growth for 2004 is being estimated as high as 3-4%.

Bolstered by the recovering economy, many opportunities exist for alert U.S. exporters. Just a few examples include:

- Organic and naturally prepared foods/drinks and functional foods/drinks for the increasingly health-conscious;
- Prepared precooked foods for convenience-conscious Japanese consumers;
- Products in easier-to-open containers for the rapidly growing elderly population;
- And others, from the basic—pork is a growing market—to the unique (e.g., prepackaged, frozen "bento" lunch boxes flown in from California).

In summary, the Japanese market offers many pluses to U.S. exporters, but it is not without difficulties. To put these opportunities in perspective, a few of the most important U.S. "Advantages" and "Challenges" are shown in the table below:

U.S. Advantages	U.S. Challenges
• Strong yen versus weak dollar • A recovering Japanese economy • U.S. food cost/quality competitiveness • U.S. product variety - from fresh, to ingredient, to processed • Reliable supply of U.S. agricultural products • Advanced U.S. food processing technology • Positive images of American sources - such as many of the tourist destinations • Relatively low U.S. shipping costs • Science-based and transparent U.S. food safety procedures • Growing Japanese emulation of U.S. cultural and food trends • Japanese food processing industry seeking new ingredients • Japanese distribution becoming increasingly like that of U.S. • Fewer Japanese farmers • Higher Japanese farming costs • Demand for high-quality healthy and functional foods	• Increased food safety awareness (BSE, etc.), increasing demands for food quality certifications and production information • Declining price competitiveness • Prolonged Japanese recession • Distance from Japan • Consumer antipathy toward biotech foods and additives • Japanese preoccupation with quality • Consumers "prefer" Japanese products (image problem with imported food in general) • High cost of marketing • Japan's policy and actions try to increase self-sufficiency • Labeling laws that are often difficult • High duties on many products • Differences in enforcement of port inspection regulations • Increasing low-cost competition from China • Sometimes subsidized European exports • Exporters are often expected to commit to special contract requirements and long-term involvement

II. Exporter Business Tips

The following are a number of thoughts, collected from a variety of sources, on exporting food products to Japan. Some are obvious, but warrant repeating; some you may never have considered. They are organized under five topics:

- Dealing with the Japanese;
- Consumer preferences, tastes, and traditions;
- Export business reminders;
- Food standards and regulations;
- Import and inspection procedures.

We hope these suggestions will prove useful in your efforts to build food exports to Japan.

Dealing with the Japanese

Japanese business people, no matter how Western they may appear, do not always approach business relations in the same way as Americans or Europeans. Some differences are simply due to the language barrier; others are due to differences in deeply held traditions and practices. To help bridge the gaps, we suggest that you:

- Speak slowly and clearly to every Japanese, even if you know he or she speaks English.
- Use clear-cut, simple words and expressions when writing in English.
- Use e-mail and fax, rather than telephone, whenever possible.
- Make appointments as far in advance as practical.
- Carry plenty of business cards (*meishi*). Present them formally at each new introduction—and be sure they have your personal information in Japanese on the back.
- Be on time for all meetings; the Japanese are very punctual.
- Expect negotiations to require a number of meetings and probably several trips to reach agreement. Early discussions may appear less fruitful than reality.
- Be prepared for misunderstandings; deal with them with tact and patience.
- Be aware that in Japanese, "*Hai*," (yes) may mean, "I understand," not, "I agree."
- Limit the discussion of business at evening meals, or when drinking with new Japanese counterparts; these occasions are for getting to know one another and building trust.
- Be aware of major Japanese holiday and business break periods, e.g., the New Year holiday (approximately January 1-7); Golden Week, a combination of national holidays (April 29 - May 5); *Obon*, an ancestor respect period lasting for about one week in mid-August during which many companies close and business people take vacations.

Consumer Preferences, Tastes, and Traditions

These ideas may help you focus your product approach. Japanese consumers:

- Are very concerned about food safety and traceability;
- Place great importance on quality—producers that fail to recognize this will not succeed;
- Appreciate taste and all of its subtleties—and will pay for it;
- Are well-educated and knowledgeable about food and its many variations;
- Are highly brand-conscious—a brand with a quality image will sell;
- Care a great deal about seasonal foods and freshness—awareness and promotion of these characteristics, where appropriate, can significantly build product sales and value;
- Are increasingly health-conscious—(Witness the many TV programs about healthy food. When a product is referred to as "healthy", on such a program, it quickly sells out at the supermarkets.)
- Care little about U.S. standards; care a great deal about Japanese standards, including the JAS organic standard.

Japanese consumers also:

- "Eat with their eyes" and often view food as art. A food product's aesthetic appearance—on the shelf, in the package, and on the table—is very important in building consumer acceptance.
- Have small families and homes with minimal storage space; thus, large packages are impractical.

Again, as in the United States, there are differences in regional food practices, preferences, and tastes. To illustrate, the Kanto and Kansai regions are compared in the chart below.

Examples of Differences in Japanese Regional Food Preferences

Tokyo (Kanto region)	Osaka (Kansai region)
· Somewhat less food cost-conscious	· Very food cost-conscious
· More salty foods	· Less salty foods
· More spicy products	· Less spicy products
· More Western products	· Somewhat fewer Western products
· More cuisine variety	· More traditional Japanese foods
· Prefer pork	· Prefer beef
· Prefer buckwheat *soba* noodles	· Prefer wheat *udon* noodles

Export Business Reminders

Below are some important reminders about exporting to Japan:

- Before coming to Japan, use the many sources of U.S. information, e.g., the Foreign Agricultural Service, state agricultural offices, state/regional trade organizations, and JETRO regional offices in the United States (see Appendix D).
- Build at least a minimum team within your company to help on the Japan market.
- Limit your number of trading partners, but avoid exclusive agreements with any one company.
- Use metric terms.
- Quote CIF, unless the importer requests FOB pricing.
- Price competitively; exclude U.S.-based costs, e.g., domestic sales, advertising, marketing, etc.
- Ensure that all sales documentation is correct.
- Be patient regarding requests for documentation, ingredients lists, production process, and quality assurance.
- Respond to such requests with diligence and in a timely fashion.
- Use letters of credit to reduce risk.
- Hedge export values with your U.S. bank if you are concerned about exchange rate risk.
- Set up wire transfers for payments.

Food Standards and Regulations

U.S. exporters often find Japanese food standards difficult to deal with. Here are a few tips:

- Read USDA/FAS the GAIN Report, Number JA4063, "Japan: Food and Agricultural Import Regulations and Standards 2004" (http://www.fas.usda.gov/gainfiles/200408/146107089.pdf). This concise document, covering food laws, labeling, packaging, import procedures, and other key regulations, should be required reading for all food exporters. It not only explains the basics, but also provides specific contact information for all the relevant import agencies. It is updated annually.
- Check JETRO report, "Specifications and Standards for Foods, Food Additives, etc. Under the Food Sanitation Law" (http://www.jetro.go.jp/se/e/standards_regulation/foodadd2004apr-e.pdf). This summarizes specific technical import procedures for food products.
- Check ATO's sector information and reports. Go to the ATO homepage (http://www.atojapan.org) and click the "Market Intelligence" menu button to get more market information and reports.
- Carefully check your food additive admissibility: e.g., preservatives, stabilizers, flavor enhancers. See Section V for Japanese government approved testing laboratories in the United States.
- Ensure that the labeling you plan to use meets Japanese requirements.
- Verify all relevant import requirements with your Japanese customers. They will normally have the most current information on Japanese regulations.
- Provide a detailed list of product ingredients to your Japanese partners to allow them to verify their acceptability. Do not assume that U.S. approval means Japanese approval.

- For organic foods: Get your organic products approved in the U.S. under USDA's National Organic Program. Then, working with your importer, you can register your product under the Japan Agriculture Standard (JAS) before importing it into Japan. Review these documents for more information:
  NOP Export Arrangement with Japan
  (www.ams.usda.gov/nop/NOP/TradeIssues/Japan.html)
  MAFF's guide (www.maff.go.jp/soshiki/syokuhin/hinshitu/organic/ eng_yuki_ how.pdf)
- After you have completed the above steps, check with the Agricultural Affairs Office at the U.S. Embassy in Tokyo (agtokyo@usda.gov) with any remaining questions on issues such as standards, tariffs, regulations, labeling, etc. Depending on content, they may refer certain inquiries to the ATOs in Japan for response.

Import and Inspection Procedures

Your job is not complete when your product has been ordered and shipped. You still must get it through Japanese customs and port inspectors. The points outlined below should aid in this process:

- Review USDA/FAS the GAIN Report, Number JA4063, "Japan: Food and Agricultural Import Regulations and Standards 2004" (http://www.fas.usda.gov/gainfiles/200408/146107089.pdf) to get a better understanding of these procedures.
- Know the specific tariffs that apply to your product before pricing to potential customers. For more information, see (www.apectariff.org).
- Remember that tariff rates in Japan are calculated on a CIF basis, and that Japan adds a 5% consumption tax to all imports.
- Do not send samples for preliminary checking unless they have been specifically requested.
- Recognize that customs clearance officials' application of the law and interpretation of regulations may differ from one port to another. Thus, the least expensive or most convenient port may not be the best choice. Check with your local customer or agent.
- Be sure to complete all documentation thoroughly and accurately.
- For fresh products, check phytosanitary and other requirements in advance and obtain proper USDA inspections in the United States (see Appendix D, www.aphis.usda.gov; www.fsis.gov).
- Be aware that biotech agricultural products and ingredients must be approved by the Japanese government and will require specific labeling to be admitted to Japan.
- Make sure you have the proper import documents accompanying shipment: 1) Import Notification; 2) Health Certifications; 3) Results of Laboratory Analysis; 4) Manufacturer's Certification showing materials, additives and manufacturing process. (Note: Products being imported for the first time may require more documentation.)

III. Market Sector Structure and Trends

The exporter's single most important strategic decision—other than those dealing with the product itself—is how to position the product and get it to the Japanese consumer, i.e., through retail, food service, and/or food processing channels. The table below summarizes the size and growth of each market.

Food and Drink Sales by Major Sector in Japan

	Historic Market Size and Growth 1997- 2002					Expected Market Growth 2003 – 2008	
	Sales			Share of Total Consumer Food Sales	1997 - 2002 Average Annual Growth	Annual Sales Growth	Annual Import Growth
	1997	2002					
	JPY trn	JPY trn	**US$ bil				
Sales to Consumers							
Retail	45.9	44.4	354	64%	-0.7%	1.0%	1.5%
*Home Meal Replacement**	*3.6*	*5.2*	*41*	*7%*	*7.6%*	*8.0%*	*10.0%*
HRI Food Service	29.0	25.6	204	36%	-2.5%	1.0%	2.0%
Total	**74.9**	**70.0**	**557**	**100%**	**-1.4%**	**1.0%**	**1.7%**
Sales of Food Processing Sectors							
Total	31.1	29.1	232	-	-1.3%	1.0%	1.0%

Sources: Food Service Industry Research Center; Ministry of Economy, Trade and Industry (METI); Promar estimates for 2003-2008.
*Because the HMR sector is included in both the retail and food service sector, figures are shown in italics.
** At an exchange rate of 125.6 yen / dollar.

Japan's food and drink sales to consumers totaled JPY 70 trn (US$ 557 bil) in 2002; sales have declined by an average of 1.4% per year since 1997. Sales of food and ingredients to food manufacturers have been less affected by the recession, but have also declined slightly, by an average of 0.8% annually. Retail sales make up the largest share of food sales, at 64%, and declines in this sector have been also small, at -0.7% annually. The food service sector, which accounts for 36% of the total, has been hard hit by the recession and has contracted sharply—2.5% annually over the period. By contrast, the home meal replacement (HMR) sector is a bright spot for consumer food sales. It grew at an average 7.6% per year and in 2002 accounted for 7% of the market as a whole, contributing to sales in both the retail and food service sector.

The difficulties of the past decade notwithstanding, and given the increasing evidence of a sustained economic recovery, which began in early 2003, prospects for the consumer food and beverage market look brighter over the next five years. Although the recovery is likely to be modest due to the maturity of the Japanese market, the food service sector, and particularly HMR, are expected to see stronger growth, in line with demographic and social changes (e.g., higher consumption of precooked and premixed meal preparations as more women work outside the home; greater institutional demand for such foods as Japan's population ages, etc.). Thus, overall retail sales and sales to food manufacturers are expected to return to healthy growth. Most importantly, import growth is likely to be significantly higher in each category than for the sector as a whole.

These three consumer food sectors - as well as food manufacturing are discussed in more detail as follows.

Retail Sector

The retail sector handles 64% of the food and drink products sold to consumers in Japan.

Japan's food retail market is still fairly fragmented. Unlike North America and the EU, Japan's retail food sector is dominated by general and specialty stores, including "mom-and-pop" stores, and local grocery stores. Such small retailers, however, are losing ground to larger general merchandise stores (GMS), supermarkets (SM), and convenience store (CVS) chains. These last three categories, in particular, offer excellent opportunities for U.S. food exporters, albeit with strong competition from domestic manufacturers and imports from Europe, China, and Australia/New Zealand.

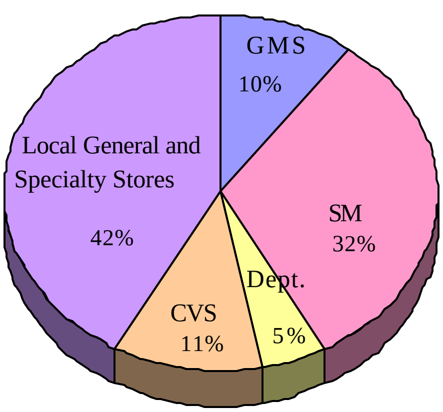
Food retailers in Japan are classified into five major sectors. The characteristics of the main retail channels are listed in the following table:

Retail Store Opportunities for U.S. Food Exporters

	GMS General merchandise stores	**SM** Supermarkets	**Department Stores**	**CVS** Convenience stores	**Local General and Specialty Stores**
Share (2002)	10%	32%	5%	11%	42%
Future growth expectations*	H to M	H to M	L	H to M	D
Receptivity to imports**	H to M	H to M	M	L	L
Especially good for:					
Established brands	H	H	H	M	L
High quality/high price	M	M	H	M	M
Good quality/low price	H	H	M	M	M
New products	H	H	H	H	L

*Growth expectations: H - high; M - moderate; L - low; D - decline
**Receptivity ratings: H - high; M - medium; L – low
Sources: METI Commercial Census (2002); ATO and Promar estimates of import growth and receptivity.

Retail Food Distribution Channel



General Merchandise Stores: General merchandise stores (GMS), together with supermarkets, are often referred to as "super" in Japan. Japan's GMS's, like super centers in U.S., offer shoppers the convenience of one-stop shopping for groceries, perishables, clothing, household goods, furniture, and electrical goods. Food turnover typically make up one-third of total sales at GMS's.

GMS outlets accounted for 10% of food retail trade in 2002. GMS's are operated by major national chain operators (Appendix A-1) that have nationwide networks with hundreds of outlets. Most of the products in these stores are centrally purchased.

GMS's are generally receptive to foreign products, although they often require product modification to suit market tastes and preferences. In addition, inventory risks, long lead times, and communication problems make GMS buyers hesitant to import products directly. They often purchase foreign products via trading companies. But as Japan's retail market becomes more competitive, and regardless of whether they source their products directly or indirectly, GMS's offer excellent opportunities for U.S. food exporters.

Supermarkets: Supermarkets are smaller than GMS's and specialize in food and household goods. On average they are quite small, only a quarter the size of supermarkets in the U.S., but newer stores are larger. Stores typically generate annual turnover of about JPY 1 billion, of which perishables, readymade, bakery, and refrigerated foods account for 70% or more of total sales.

As of 2002, supermarkets handled 32% of food retail trade. Over the last 10 years, total store sales have jumped by more than 40%, while the number of stores has risen by 20%. Leading supermarkets are building larger stores, aided by declining land prices and the easing of restrictions on store size. Average retail floor space nearly doubled to 900 m² - 1,000 m² in 2002, compared to 500 m² - 600 m² in 1991.

Supermarkets face higher purchasing costs than GMS stores. They are looking for greater product differentiation, own-label development, and global sourcing. To achieve economies of scale, regional supermarkets are forming alliances, such as joint merchandising companies, with non-competing retailers. Thus, although individual retailers are not large enough to engage in direct offshore sourcing; those joint merchandising companies offer excellent opportunities for U.S. food exporters, particularly as a means of differentiation from the competing national chains.

Department stores: Department store sales have steadily declined in recent years due to growing competition from GMS's and other retailers, in addition to the recession. Since 1991, the number of outlets has declined 25% and total sales have slid 29%. Food sales at department stores have declined in tandem, and currently account for only 5% of total food sales.

Department stores are an underexploited channel for many U.S. exporters (Appendix A-2). Concessions (i.e., small, independently operated retail stands), as well as outlets operated by department stores themselves, offer an opportunity for U.S. exporters to launch pilot stores or to conduct marketing trials. Department stores provide a showcase for imported, novelty, and high-end products. They thus provide excellent opportunities for U.S. exporters of high-quality and fancy foods.

Convenience stores: Convenience stores (CVS) are an extremely important sales channel in Japan. Despite the sluggish food market in Japan as a whole, CVS's have rapidly increased their retail presence, doubling sales since 1991. The CVS sector is quite concentrated, with the top five operators holding an 87% market share. Seven-Eleven Japan, the largest CVS operator, has more than 10,000 outlets in Japan. At 11%, the share of food sales held by convenience stores is now larger than that of GMS's (10%).

Convenience stores, or "conbini" in Japanese, have very limited floor space, about 100 m² on average, and typically stock about 3,000 products. They are well-known for their high turnover and advanced inventory management. Over 90% of CVS are not owned, but franchised.

The approach of Japanese CVS's to merchandising is unique and innovative. Ready-made foods, such as boxed lunches, make up about 40% of total sales. Because there were relatively few large manufacturers of ready-made food, CVS operators developed original products in collaboration with suppliers. This "team merchandising" approach extends to branded grocery lines as well. Team merchandising has also influenced Japan's food and drink manufacturers. Currently 30–50% of sales at CVS's are original products or exclusive brands.

Convenience stores derive their competitive advantage based on high turnover and extremely efficient supply chains. Thus, short lead time and nationwide distribution are essential in dealing with major CVS operators. While this presents a significant challenge for many overseas companies, indirect business nevertheless offers huge potential for exporters. Global sourcing, especially for ingredients and raw materials used in fast food, has become more popular. CVS operators not only work with consumer product manufacturers but also with trading firms and ingredients manufacturers. In order to differentiate themselves from their competitors, major CVS operators are constantly searching for novelty and new concepts, which offers good opportunities for US food exporters.

Local General and Specialty Stores: Japan's food retail trade is still dominated by local specialty stores and grocery shops, most of which are small, family-run operations. These retailers, however, offer limited market potential for exporters. They are served by secondary or tertiary wholesalers, which, in turn, are supplied by Japan's major wholesalers. This sector has been shrinking rapidly as the food market has become more competitive. Deregulation of liquor licensing, for example, is expected to lead to the closure of most small liquor shops. Certain retailers located principally in the Tokyo metro market specialize in imported products and may offer the shortest path for selling imported foods at retail (particularly snacks and novelty items) unmodified for the Japanese market.

Home Meal Replacement Sector

The Home Meal Replacement (HMR) sector accounted for 7% of food sales to consumers in 2002. It also represents more than 10 percent of many retailers' total sales and is now one of the key battlegrounds for food sales in Japan. As in North America and the EU, the strong growth of HMR is one of the most important developments in the Japanese food sector in recent years. Examples of popular products in this sector are prepared foods sold at supermarkets, takeout meals sold at specialty store chain operators, and various readymade foods sold at convenience and department stores. There is thus some overlap with the channels outlined above.

In recent years, HMR sales have grown 7% to 8% annually, and the sector is a driving force in Japan's food and drink market. Demand for cheaper, more convenient, and better tasting food is expected to spur further growth in the HMR sector as the number of working women, single households and elderly rise.

Although the sector consists mostly of small regional companies, consolidation is increasing. These larger producers, in turn, supply major supermarket operators and convenience stores, and tenants in department stores. There are a number of constraints facing U.S. exporters in this sector. High-volume buyers are still relatively rare; global sourcing and direct transactions with foreign suppliers are also uncommon. In addition, relatively high turnover for menu items often makes companies hesitant about global merchandising. Nevertheless, HMRs are potentially an ideal customer for U.S. food exporters, especially those willing to meet stringent cost, quality, pre-cooking and size specifications. The major HMR producers are listed in Appendix B-4.

Overall Trends in the Retail Sector

The competition among the larger more viable segments in the retail sector, GMS, Supermarkets, Departments Stores and Convenience stores has created pressures on Japan's traditional distribution channels to adapt to retailer's needs. Generally, to remain viable these retail segments require constant attention to maintaining a large variety of products on the shelves and to be able to adjust quickly to popular consumer trends. To do this, these retailer segments can no longer depend on a distribution channel that does not quickly respond to these requirements. As a result, the GMS segment has already begun a trend of increasing direct procurement from producers and/or contracted with certain wholesalers to serve as their own intermediary. In response, smaller less efficient providers in the distribution channel are in the midst of mergers or are being acquired to achieve improved economies of scale. According to a recent JETRO report:

> "Rationalizing the structure of distribution and cutting the cost of physical distribution is especially urgent for large retailers that carry a wide range of different products and need to lower operating costs, including GMSs, Supermarkets, convenience stores, home centers and chain drugstores…..As a result, wholesalers in the food, miscellaneous goods, drug and cosmetics sectors increased the size of their businesses through mergers and acquisitions and by creating corporate groups."
>
> (Source: *Guide to Business Opportunities in Japan (Retail, Wholesale, and Food Service Market),* Japan External Trade Organization, http://www.jetro.go.jp/it/e/pub/guide/index.html)

HRI Food Service Sector

The Japanese food service sector accounted for approximately 36% of consumer food sales in 2002. Food service encompasses four major segments: restaurants; hotels and other accommodation facilities; bars, cafes, and coffee shops; and institutional food service companies serving schools, hospitals, and corporate facilities.

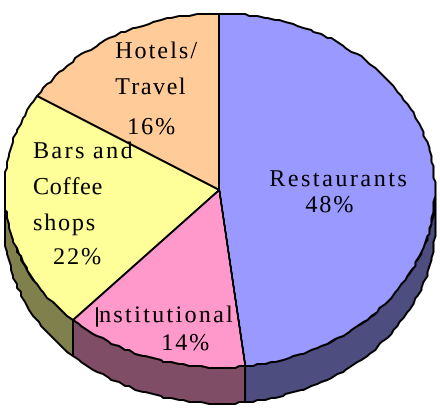
The characteristics of these four segments are summarized in the following table.

Food Service Opportunities for U.S. Food Exporters

	Restaurants	Hotels/ Travel related	Bars/ Coffee shops	Institutional
Share (2003)	49.6%	14.0%	21.6%	14.8%
Future growth expectations*	H	M	M	H
Receptivity to imports**	H	H	M	H
Especially good for:				
High quality/high price	H	H	L	L
Good quality/low price	H	H	H	H
New products	M	H	M	M

*Growth expectations: H - high; M - moderate; L - low; D - decline
**Receptivity ratings: H - high; M - medium; L – low
Sources: Food Service Industry Research Center (2002); ATO and Promar estimates of import growth and receptivity.

Food Service Distribution Channel



Share of Restaurant Sales by Type of Outlet (2003)

General restaurants	70.9%
Noodle shops	8.9%
Sushi shops	10.7%
Other	9.5%
	100.0%

Source: Food Service Industry Research Center

Restaurants: The restaurant segment offers the best export prospects for the United States of the four food service segments covered in this report. Nearly half of current food service sales are generated at these commercial outlets. The restaurant segment comprises four main types of outlets as shown in the box above. The restaurant segment had approximately JPY 12 trn (US$ 96 bil) in sales in 2002, at more than 240,000 outlets. However, as with retail, the sector is quite fragmented and most restaurant businesses are quite small, with roughly 70% outlets run by individuals or families.

Moreover, the restaurant segment has been in decline in recent years, with sales down 7% from 1997 to 2002. Business remained generally weak in 2003. Family-owned restaurants have been disappearing rapidly due to increased competition from HMR, food retailers, and restaurant chain operators using new, more specialized formats. The restaurant segment has also been seriously affected by the recession. In Japan's deflationary environment, fierce price competition, led by fast food restaurants, has undercut profitability. Nevertheless, several recent upscale entries to the market have had a good start. Public relations and/or brand recognition is a key to long term success.

Several major "family restaurant" chains are increasingly important in the segment. Because they compete primarily on price, they are much more active in global sourcing than their smaller rivals. These chains thus represent a significant opportunity for U.S. food exporters. Chain restaurants are particularly interested in semi-processed or precooked foods. Premixed ingredients, seasonal fruits and vegetables, specialty sauces and seasonings, and desserts are particularly attractive products for chain operators.

Japan has a large and competitive fast food segment made up of both domestic and overseas operators. Most *gyudon* (beef bowl) restaurant chains have long been big U.S. beef buyers, and they have suffered major losses from the ban on U.S. beef imports due to BSE. Generally, fast food restaurant operators are volume buyers of specific raw materials. In addition to low cost, suppliers must provide a stable supply of products at a specific quality to compete effectively in this segment.

Most large restaurant chains can be dealt with directly (Appendix B-1) but for the smaller chains, exporters must build relationships with trading companies or major food service wholesalers (Appendix A-4).

Hotels and travel related: Major hotels are attractive markets for U.S. exporters. Most hotels are chains and over 40% of their income, on average, comes from food service. Hotels, especially, are more oriented toward Western food and frequently have "food fair" promotions featuring different countries' cuisines. The exporter's challenge lies in developing effective distribution channels to reach them (Appendix B-2). Hotels offer high consumer visibility and thus promotional value for exporters. Highlighting the fact that a particular exporter's product is used by a major upscale hotel chain, for example, is a good means of promoting the product to retailers and other prospective buyers.

Railway companies and airlines operate kitchens in Tokyo and Osaka, while the overseas airlines tend to use contract caterers. Japanese companies emphasize Japanese cuisine and are somewhat less receptive to imported Western products. Theme parks are also an important part of the sector. Tokyo Disneyland and

Universal Studio Theme Park, for example, draw millions of visitors every year to their hundreds of restaurants and snack outlets. Other theme parks around the country also attract thousands of visitors a day.

Bars and coffee shops: These establishments account for 22% of total food service sales. Although bars have been in decline, mainly due to the recession, coffee shops—especially chain operators—continue to show significant growth. Foreign chains such as Starbucks have made significant inroads in Japan over the last few years. Both bars and coffee shops are major markets for beverages and snack foods (e.g., sandwiches, pastries).

Institutional food markets: The institutional market comprises cafeterias at factories and offices (54%); hospitals (27%); school cafeterias (13%); and welfare facilities (6%). These institutions operations are typically served by contract caterers (Appendix B-3). Building relationships with caterers is therefore essential to crack this market. Both contract caterers and institutions with their own kitchens are typically serviced by large food service wholesalers (Appendix A-4). Because the most important criterion for institutional suppliers is cost competitiveness, the sector offers huge market potential for U.S. exporters, which often enjoy significant advantages in this respect.

In line with the overall food service sector, the contract catering market has been shrinking in recent years. This is mainly due to sluggish economic conditions, characterized by corporate layoffs, closures of offices and factories, and cutbacks in corporate fringe benefits. Long term, however, prospects are brighter due to higher demand from contract caterers serving the hospital and social welfare segments. This growth will be driven by an aging population, reforms to the medical insurance program for the elderly, and the launch of a nursing care insurance program.

Food Processing Sector

Appendix C lists the most important food manufacturers in several food sectors. These food processors offer a number of opportunities to U.S. exporters, and they have the capacity to buy the following types of products from overseas:

- Ingredients for production in Japan;
- Finished products sold under their own labels;
- Finished products sold under the exporter's brand, but distributed through the importer's channels.

Dealing with food processors offers a number of advantages:

- They often buy in large volume;
- They have sophisticated distribution systems;
- They have a good understanding of their suppliers' businesses.

However, one should keep in mind that an exclusive agreement with a Japanese food manufacturer can lock a U.S. supplier of branded foods into a single distribution channel. This drawback must be balanced against the advantages in terms of the increased customer exposure, immediate sales, and higher volumes these relationships can often entail.

Unlike the food retail and food service sectors, the food-manufacturing sector is relatively stable. Because manufacturers sector place a premium on consistency and quality of inputs, and because alternative sourcing often requires adjustment at the production site, they tend to enter into long-term relationships with foreign suppliers and do not often change suppliers based on price.

On the other hand, manufacturers are very demanding regarding the release of data on product quality, scientific data, origin of ingredients, and other related information. Such data is increasingly important because of recent food scandals in Japan, and growing concerns about food safety and traceability among consumers. U.S. exporters must be prepared to deal positively and promptly with these issues to compete in this market.

IV. Best High-Value Import Prospects

Many U.S. products are good import prospects for Japan. In this section, we present two lists of such prospects. The first lists “best prospects” as identified by ATOs and Promar. The second lists new products that have been popular in recent years.

Best Prospects

The following presents a list of products that we believe can currently be considered "best" import prospects. They were selected based on a number of criteria—high volume, demonstrated growth, and U.S. competitiveness. All products rated "A" in Figure 1, Section V met these criteria. Other products were selected because they are not generally available in Japan, because they fit a growing need (e.g., aging/health) or because they represent a unique concept that offers significant potential.

Best Import Prospects

Product Category	HS code	2003 Market size (000 MT)	2003 Imports (000 MT)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Pork	0203	2,302	778	9%	361~482JPY/ kg	Strong competition from Denmark and Canada in Frozen Cut Boneless. Falling price of domestic pork.	Due to BSE issue, demand for U.S. pork is growing rapidly. U.S. has advantages in Fresh Cut Boneless. Sausage imports are performing well in the last 5 years.
Beef	0201 0202	1,296	576	[4%]*	38.5%	Safeguard protection initiated in 2003. Single cow found with BSE in December 2003 from the State of Washington led to a yearlong ban by Japan on beef imports from the United States.	The overall beef market in Japan has been shrinking somewhat because of ongoing ban on beef imports from the U.S., but the quality image of U.S. beef has remained strong even during its absence from the market. Australian beef may succeed in gaining some share while fulfilling supply needs in the interim, but the U.S. has advantages for quantity and price expectations and supplying grain-fed and specialty beef products.
Natural Cheese	0406.10	232	61	2%	22.4~29.8%	Tough price competition with Australia and NZ. Significant trade barriers. The lack of U.S. industry understanding and no U.S. image for cheese with Japanese consumers.	The Japanese cheese market represents a growing opportunity. Imports are growing faster than domestic production.
Snack food (excl nuts)	1905.90 2005.90. 190 2106.90. 294		111	18%	6%~34%	Packaging may need to be revamped, not only for language but for appeal and convenience.	Suppliers that can offer custom packaging will have greater success over others. Products containing healthy, functional ingredients have strong consumer appeal.

Product Category	HS code	2003 Market size (000 MT)	2003 Imports (000 MT)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Frozen vegetables	0710 2004	727	629	(4%)	6~23.8%	Price competition from China, which is a lower cost source for raw and boiled vegetables. "Unsafe" image of frozen vegetables due to problems with Chinese frozen products.	U.S. is biggest supplier of frozen potato products and the market is growing rapidly. Market growth is expected along with growth of home meal replacement market.
High quality natural fruit juice	2009	755,962 KL (fruit juice)	238,962 KL (fruit juice)	(1%)	5.4~29.8%	Competition from South Korea and Taiwan is severe.	High quality natural fruit juices are preferred by the health conscious. Fruit juice drink bars are increasing. Grapefruit juice and Orange juice have a big share.
Berries	0810.20 0810.40 0811.20	8	7	19%	6~9.6%	Domestic consumption of berries is limited. Promotional effort is needed.	The market is growing rapidly. Domestic production is small and U.S. share is over 40%. Berries are becoming popular as "functional food".
Tree nuts	0801 0802	110	79	(1%)	Free~12%	Nuts not popular to be eaten alone as a snack; continued promotional efforts needed to expand uses.	Tree nut market in Japan is still relatively small and offers good growth potential. Domestic production other than almonds is small. Promotions targeted at baking industry are working well. Consumers are interested in nuts' health functionality. U.S. has largest share for almonds, walnuts, and pecans.
Wine	2204	281,671 KL	167,879 KL	(10%)	15% or 125JPY/l, whichever is less, (min. duty of 67 JPY/l)	Competition from France and Italy, especially for the JPY 1000-2000 price range.	Wine market is growing, doubling in 10 years. Wine still only 6% of total alcohol consumption; the market should grow. U.S. share has been increasing recently. The lower Yen/Dollar exchange rate is a plus.
Pet food	2309	790	451	1%	Free~59.5JPY /kg	Competition from Southeast Asia, which is a lower cost source for wet cat food than the U.S. (Note: U.S. Packages are larger than those desired in Japan.)	U.S. is a low-cost supplier of dry & wet dog food and dry cat food. The trend to more highly differentiated, higher-quality value-added pet food items should help U.S. suppliers who have good technology.

Product Category	HS code	2003 Market size (000 MT)	2003 Imports (000 MT)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Cakes, waffles, pies	1905	-	84	12%	9~29.8%	Competition from Taiwan and Hong Kong.	Domestic consumption of bakery products is growing. Sales of waffles rising recently. U.S. share is growing due to growing popularity of cafés, including proliferation of Seattle-style coffee shops offering pastries.
Salmon	0302.12 0303.11 0303.19 0303.22	382	148	15%	3.5%	Farmed salmon competition from Chile, Norway, Australia and New Zealand, employing advanced frozen food technologies to improve quality and tailoring their products to specific portion size.	U.S. image as supplier of wild" and "natural" salmon. Seasonal promotion is a plus.
Non alcoholic beverages products	2202.90 2209.00		51,653 KL	26%	9.6%~13.4%	Intense competition likely from a growing variety of local low alcohol beverage products.	Aside from a growing trend among younger consumers, the market growth for these products is partially due to changes in the liquor tax which favors low alcohol beverages.
Functional foods	-	JPY 576 bil	-	-	See specific product category	Japan has important functional food standard requirements that must be met.	Market growing very rapidly; expanded threefold or more in last 5 years.
Food preparation products	2106.90		305	7%	9%~29.8%+¥ 1,159/kg	Competition is likely from Europe. Any flavorings may need to be tailored to the Japanese taste. Detailed processing outlines and ingredients must be known. Time must be taken to orient new prospective end users to learn how to use the product.	Low cost, labor saving and convenient food prep. products are welcome in a market where every aspect of food production and processing is expensive.

Sources: ATOs; Promar; MAFF Japan; METI Japan; Japan Frozen Food Association; Japan Tax agency; Chocolate and Cocoa Association Japan; Japan Ham Sausage Association; Agriculture & Livestock Industries Corporation.

Successful New Products

In addition to the foregoing, the U.S. exporter might wish to consider options suggested by one or more of the new products considered "hot" in the Japanese market in recent years.

Year	**Product**	**Manufacturer**	**Annual Sales** US$ 000
2000	Kirin Fire (**coffee drink**)	Kirin Beverage	406
	Namacha (**green tea**)	Kirin Beverage	335
	Qoo (**sports drink**)	Coca-Cola	295
	DAKARA (**sports drink**)	Suntory	243
	Meiji Probio Yogurt (**yogurt drink**)	Meiji Dairies	64
	Mousse Pocky (**chocolate snack**)	Ezaki Glico	64
	Nisshin no Tongarashi (**instant noodle**)	Nisshin Food Products	56
	Akebono Sobameshi (**instant noodle**)	Nichiro	26
	Recaldent (**chewing gum**)	Warner Lambert*	24
2001	Asahi Hon-nama (**low-malt beer**)	Asahi Breweries	1,128
	Marocha (**green tea**)	Coca-Cola	398
	Roots (**coffee drink**)	Japan Tobacco	231
	Umacha (**green tea**)	Asahi Beverage	199
	Kikicha (**green tea**)	Kirin Beverage	197
	Kirin chu-hai Hyoketsu (**cocktail**)	Kirin Breweries	147
	Torokeru Curry (**instant curry**)	S&B Foods	48
	Soup Pasta (**instant noodle**)	Ajinomoto	16
2002	Georgia European Blend (**coffee drink**)	Coca-Cola	406
	Amino Supli (**sports drink**)	Kirin Beverage	231
	Ryokusui (**green tea**)	Suntory	219
	Gokuri (**sports drink**)	Suntory	119
	Probio yogurt LG21 Drink Type (**yogurt drink**)	Meiji Dairy	56
	Goota (**instant noodle**)	Nisshin Food Products	48
	Lactoferrin Yogurt (**yogurt**)	Morinaga Milk	24
	Velters Original (**dessert**)	Industry	24
	Rook Kakugiri Ichigo no Mousse (**children's**	Morinaga	20
	dessert)	Fujiya	12
	Asia Men (**instant noodle**)	Ajinomoto	7

	Kewpie Zero non-Cholesterol (**mayonnaise**)	Q.P.	

* The product is currently sold by Cadbury Japan.

Source: Nikkan Keizai Tsushin, "The Beverage & Food Statistics Monthly" Aug. 2003.

V. Key Tables and Charts

These following tables and charts are included to provide U.S. exporters with a better understanding of Japanese food market and economy.

Figure 1 Japanese Imports and U.S. share of Top 30 Consumer Foods and Edible Fishery Products

								Unit: US$ mil
Rank	Product name	2000			2003			Rating
		Total	US	share	Total	US	share	
1	Pork	3,236	955	30%	4,172	1,364	33%	A
2	Beef	2,600	1,510	58%	2,311	1,199	52%	A
3	Shrimp	3,043	6	0%	2,134	5	0%	C
4	Wine	806	63	8%	980	64	7%	A
5	Salmon and Trout	476	1	0%	950	123	13%	B
6	Pet food	790	332	42%	894	326	36%	A
7	Frozen vegetable	829	295	36%	824	260	32%	A
8	Chicken	843	97	12%	799	59	7%	A
9	Crab	994	99	10%	798	91	11%	B
10	Cheese	550	28	5%	619	28	5%	A
11	Coffee	813	17	2%	601	24	4%	C
12	Tuna	676	25	4%	594	13	2%	C
13	Banana	553	3	0%	588	0	0%	C
14	Internal organs of beef	819	671	82%	585	515	88%	C
15	Fruits juice	481	165	34%	460	108	24%	A
16	Cod's roe	551	304	55%	456	310	68%	A
17	Eel	791	0	0%	385	0	0%	C
18	Octopus	363	0	0%	334	0	0%	C
19	Sugar	307	1	0%	314	1	0%	C
20	Whisky	358	75	21%	295	63	21%	B
21	Barley	245	37	15%	287	75	26%	B
22	Squid	300	8	3%	277	9	3%	C
23	Rice	265	152	57%	270	141	52%	A
24	Dried vegetable	264	24	9%	261	23	9%	B
25	Pasta	201	16	8%	260	23	9%	B
26	Cake, waffle, pie	135	24	17%	259	67	26%	A
27	Grapefruits	255	210	82%	250	189	76%	A
28	Flatfish	215	69	32%	226	51	23%	C
29	Echinus/ sea urchin	267	107	40%	213	54	25%	B
30	Cod	238	220	93%	201	196	98%	A

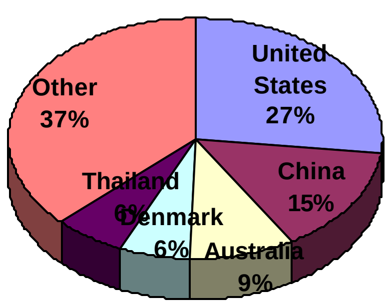
* Rating of U.S. opportunity to increase exports: A-Excellent; B-Fair; C-Poor
** Individual import items are converted to U.S. dollars at 2000 and 2003 exchange rates, 107.4 and 106.97 respectively.
(see Appendix A-3).
Sources: MAFF Japan; Japan Customs; Ratings by Promar Japan and ATOs.

Figure 2 Top Suppliers of Japanese Food and Fishery Imports

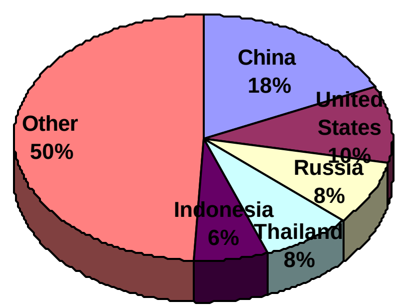
Consumer Oriented Food					Edible Fishery Products				
Country	2000		2003		Country	2000		2003	
	Share	Rank	Share	Rank		Share	Rank	Share	Rank
United States	30.5%	1	26.9%	1	China	15.1%	1	18.2%	1
China	14.6%	2	14.6%	2	United States	10.8%	2	10.1%	2
Australia	9.0%	3	9.0%	3	Russia	8.5%	3	8.4%	3
Denmark	6.2%	4	6.3%	4	Thailand	7.4%	4	7.7%	4
Thailand	4.4%	6	6.0%	5	Indonesia	6.3%	6	6.4%	5
Canada	4.5%	5	5.4%	6	Taiwan	4.5%	8	5.5%	6
France	3.9%	7	4.2%	7	Vietnam	3.2%	12	5.0%	7
New Zealand	3.7%	8	3.6%	8	Chile	4.8%	7	4.9%	8
Philippines	2.6%	10	2.8%	9	Korea, South	6.6%	5	4.7%	9
Korea, South	2.7%	9	2.3%	10	Norway	4.0%	10	3.9%	10
Brazil	1.8%	13	2.2%	11	Canada	3.7%	11	3.6%	11
Netherlands	1.9%	11	1.9%	12	Australia	3.2%	13	2.6%	12
Mexico	1.8%	12	1.7%	13	India	4.1%	9	2.1%	13
Italy	1.3%	14	1.6%	14	Morocco	1.9%	14	1.3%	14
Chile	0.8%	15	1.3%	15	Spain	1.1%	15	1.1%	15
Other	10.3%		10.2%		Others	14.9%		14.5%	
Total	2,113 bn. JPY		2,329 bn. JPY		Total	1,634 bn. JPY		1,445 bn. JPY	

Sources: World Trade Atlas; Japan Customs.

Top Consumer Foods Suppliers (2003)

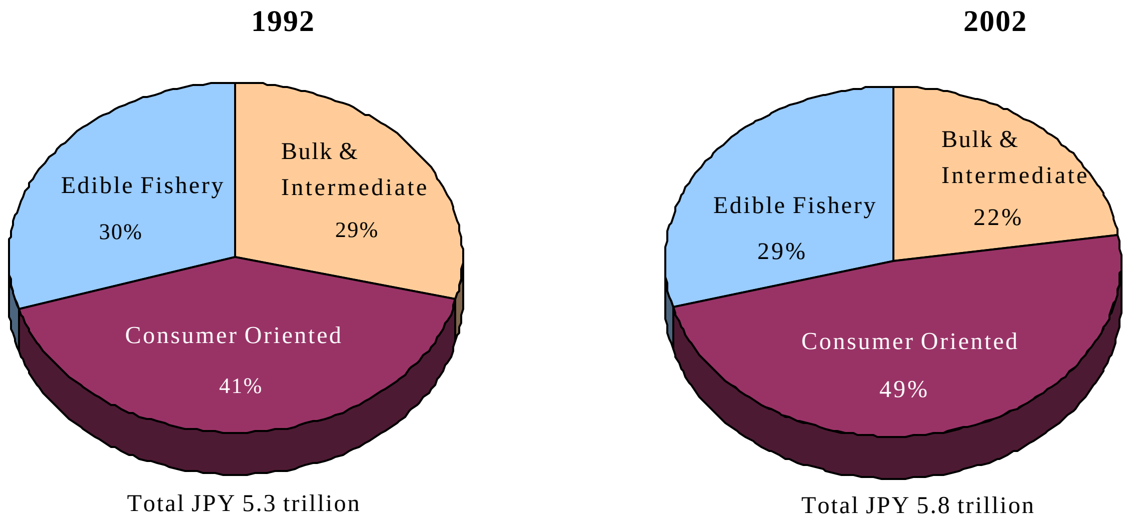


Top Edible Fishery Suppliers (2003)



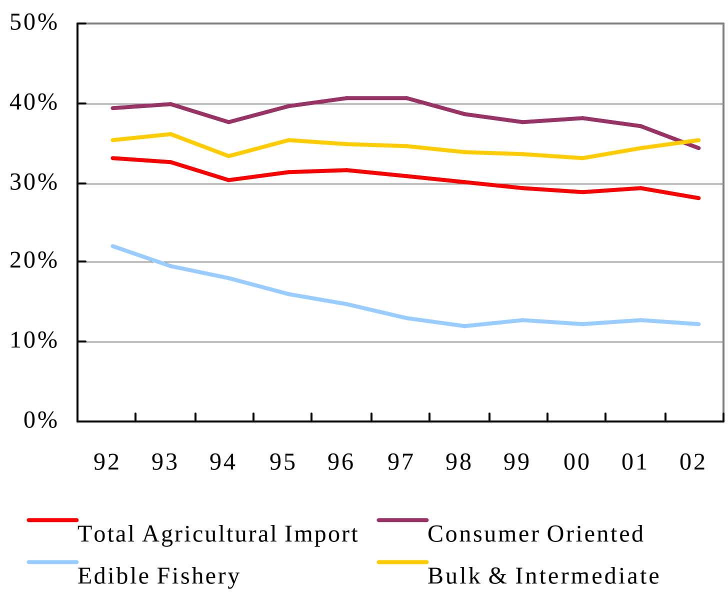
The United States is Japan's largest supplier of consumer-oriented foods and second largest supplier of edible fishery products. China is the largest fishery products exporter to Japan and the second largest for consumer-oriented foods.

Figure 3 Change in Japanese Food Import Mix



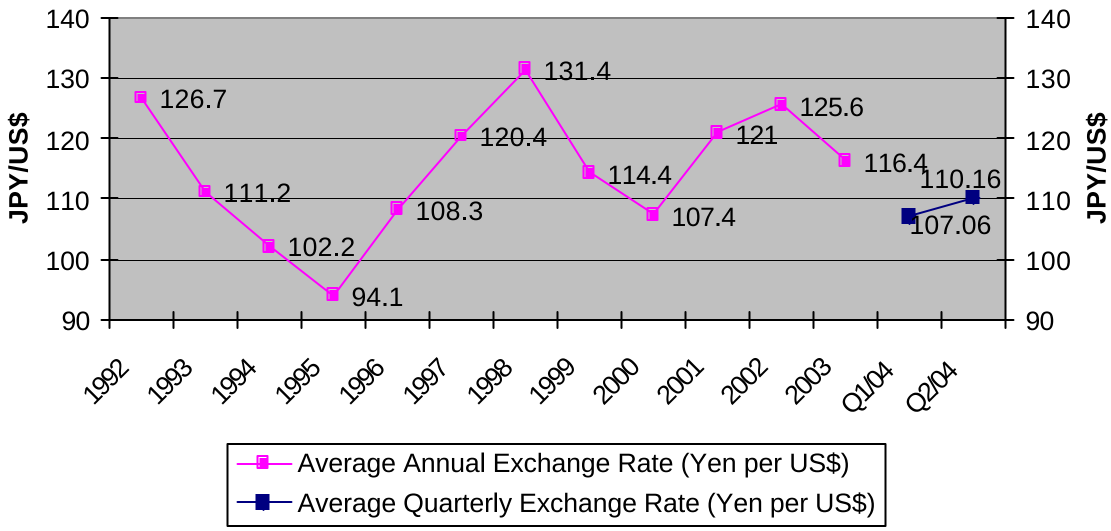
Sources: World Trade Atlas; Japan Customs.

Figure 4 Trends in U.S. Shares of Japanese Food and Agricultural Imports



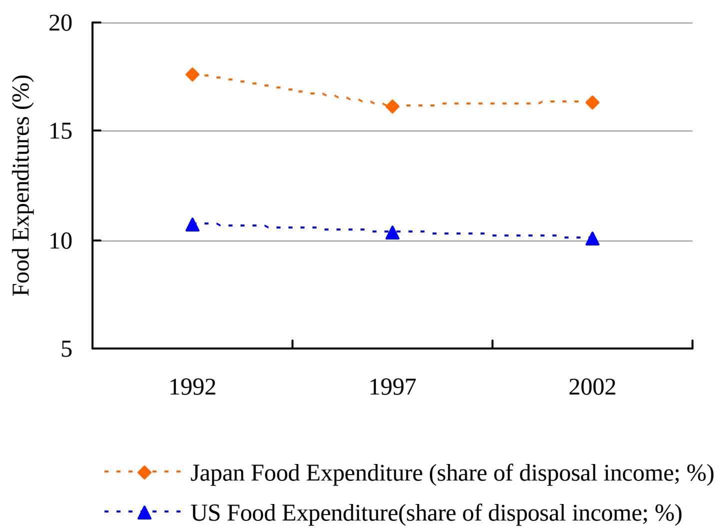
Sources: World Trade Atlas; Japan Customs.

Figure 5 Exchange Rate (JPY per US$) 1992-2004



Sources: International Monetary Fund; World Bank; Japan Customs.

Figure 6 Japan's Food Expenditure Compared to the United States



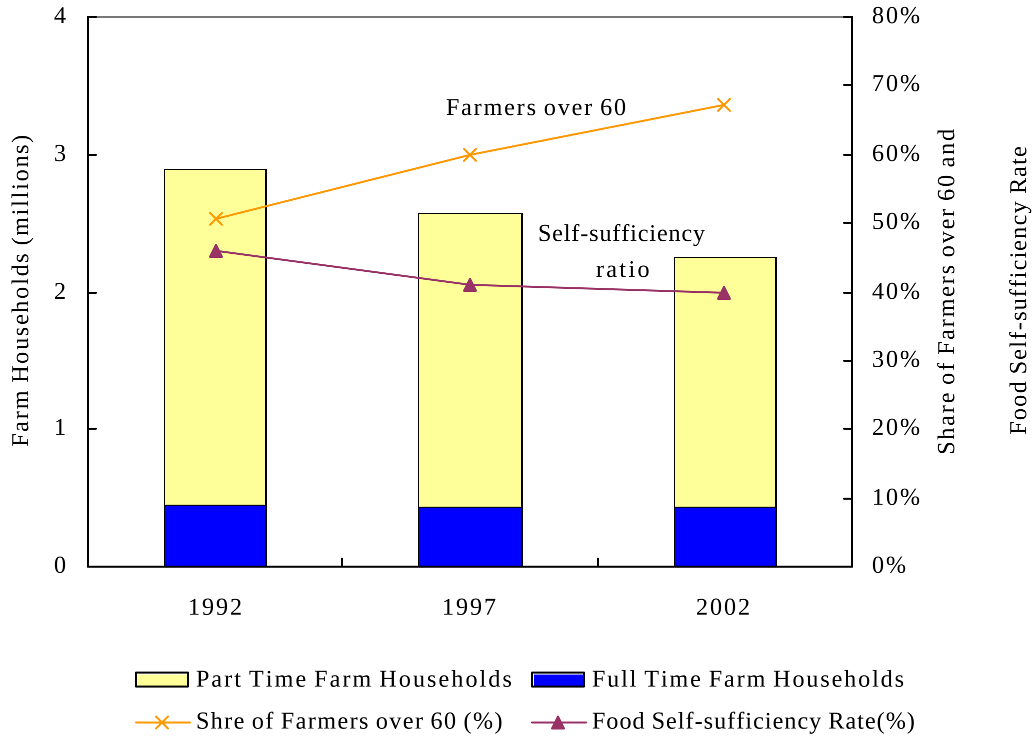
Sources: Statistics Bureau, MOF Japan; USDA.

Figure 7 Comparative data between Japan and United States which influence food production and consumption

	Japan	U.S.
Population (mil)	127	288
Area (000sq.mi)	146	3,718
Population density (people/sq. mi.)	870	77
GDP (US$ billion)	3,981	10,417
GDP per capita at purchasing power parity (US$)	28,000	37,600
Agricultural land (mil ha)	5	377
No. of farmers (mil)	2.3	0.9
Farmers of the population (%)	3.0	0.3
Farm average size (ha)	1.67	174
Price of farmland (US$/ha)	11,592	1,720
Avg. manufacturing labor costs (US$/hr)	20.0	15.29
Electricity costs (US$/Kw)	0.13	0.04
Gasoline prices (US$/liter)	0.79	0.35
PC ownership (per100persons)	35	63

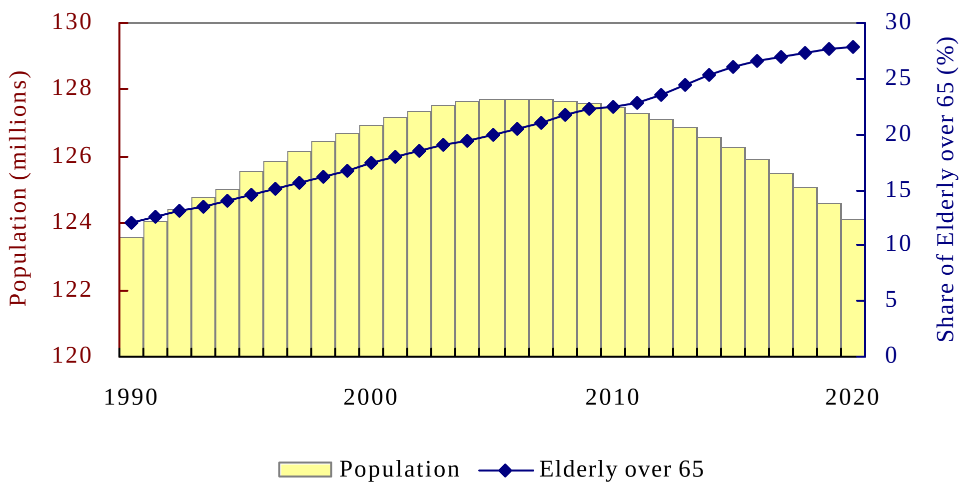
Sources: MAFF Japan; MOF Japan; Petroleum Information Center; World Bank; CIA; USDA; IEEJ.

Figure 8 Japanese Food Self –sufficiency Rate and Declining Farmer Population (1992-2002)



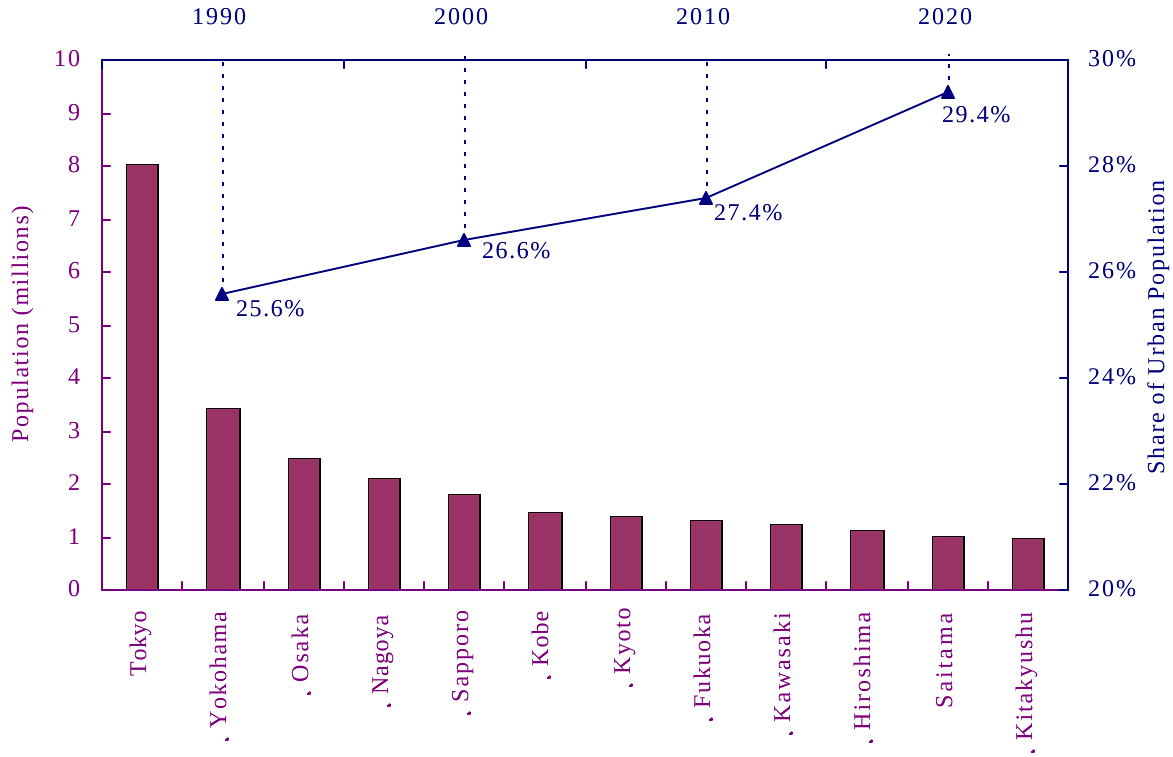
Sources: MAFF Japan; MOF Japan.

Figure 9 Japan’s Population Growth and Expected Decline



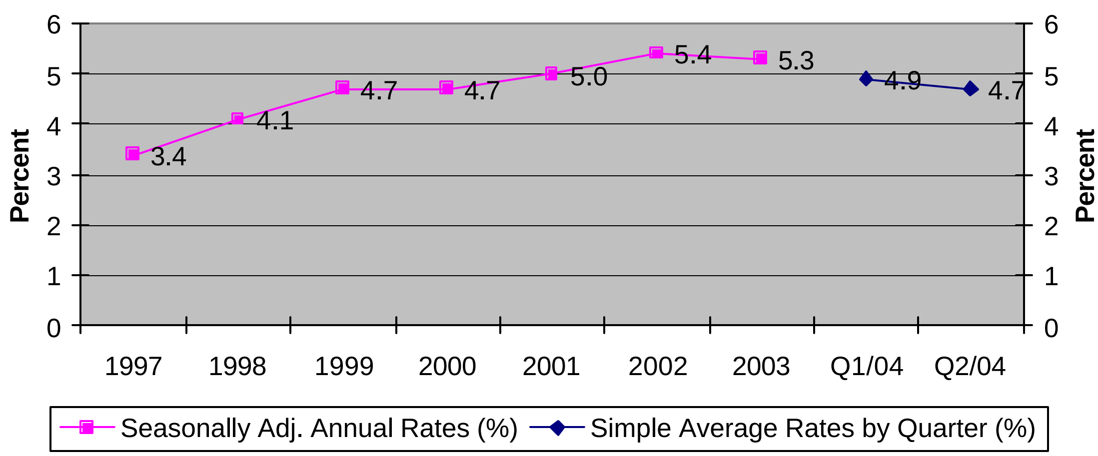
Source: National Institute of Population and Social Security Research.

Figure 10 Major Japanese Cities and Urban Growth



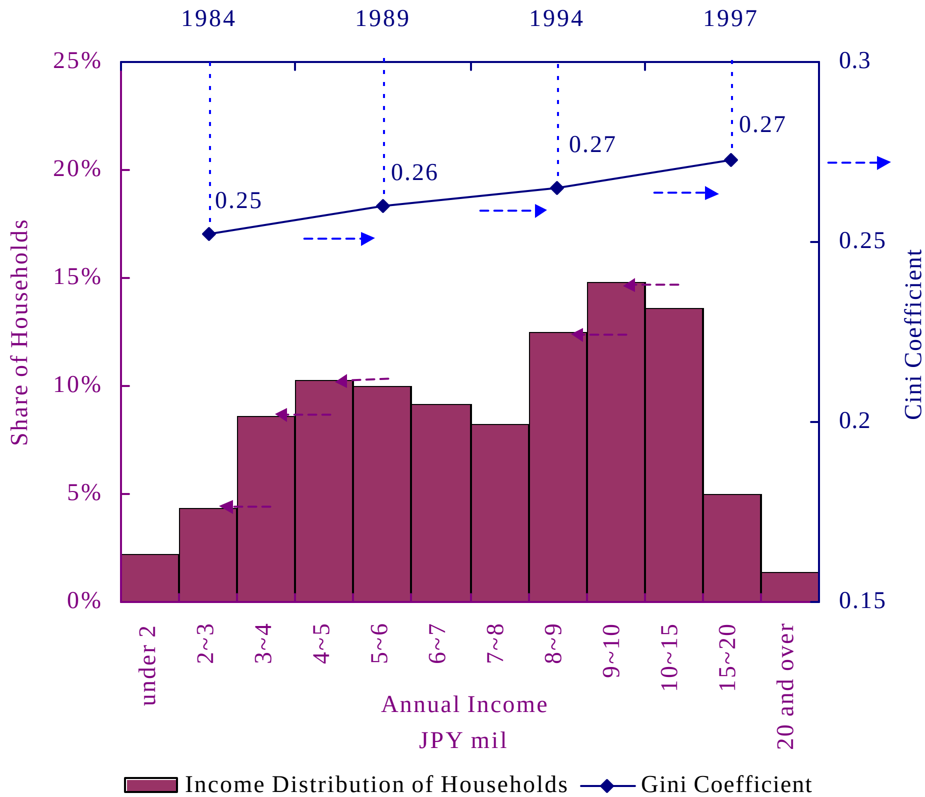
Source: MOF Japan.

Figure 11 Japanese Unemployment Rate 1997-2004



Source: National Institute of Population and Social Security Research.

Figure 12 Japanese Income Distribution (1997) and Gini Coefficient



Source: MOF Japan

Appendix A. Japanese Retailers

*2003 Average Exchange Rate of Y115.92 is used for both Appendix A and B

Figure A-1: Top 10 Supermarkets (2003)

Rank	Company Name	Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Aeon	31	*861	Nationwide	Tel: 81(0)43-212-6000 Fax: 81(0)43-212-6849 www.aeongroup.net	1-5-1 Nakase, Mihama-ku, Chiba 261-8515
2	Ito-Yokado	31	177	Nationwide	Tel: 81(0)3-3459-2111 Fax: 81(0)3-3459-6873 www.itoyokado.iyg.co.jp	4-1-4 Shiba-Koen, Minato-ku, Tokyo 105-8571
3	Daiei	17	265	Nationwide	Tel: 81(0)3-3433-3211 Fax: 81(0)3-5968-6732 www.daiei.co.jp	2-4-1 Shibakoen, Minato-ku, Tokyo 105-8514
4	Uny	10	156	Chubu, Kanto	Tel: 81(0)587-24-8111 Fax: 81(0)587-24-8024 www.uny.co.jp	1 Amaike-Gotandacho, Inazawa City, Aichi Pref. 492-8680
5	Seiyu	9	209	Nationwide	Tel: 81(0)3-3598-7000 Fax: 81(0)3-3598-7763 www.seiyu.co.jp	2-1-1 Akabane, Kita-ku, Tokyo 115-0045
6	Izumi	4	71	Kinki, Chugoku	Tel: 81(0)82-264-3211 Fax: 81(0)82-26-5895 www.izumi.co.jp	2-22, Kyobashi-cho, Minami-ku Hiroshima-shi, Hiroshima 732-0828
7	Maruetsu	3	201	Kanto	Tel: 81(0)3-3590-1110 Fax: 81(0)3-3590-4642 www.maruetsu.co.jp	5-51-12 Higashi-Ikebukuro, Toshima-ku,Tokyo 170-8401
8	Heiwado	3	88	Kinki, Chubu	Tel: 81(0)749-23-3111 Fax: 81(0)749-23-3254 www.from.co.jp/heiwado/	31,Koizumi-cho, Hikone-shi, Shiga 522-0043
9	Izumiya	3	84	Kinki	Tel: 81(0)6-6657-3310 Fax: 81(0)6-6657-3398 www.izumiya.co.jp	1-4-4 Hanazono-Minami, Nishinari-ku, Osaka 557-0015
10	Fuji	3	82	Shikoku, Kinki	Tel: 81(0)89-926-7111 Fax: 81(0)89-925-6981 www.the-fuji.com	1-2-1, Miyanishi, Matsuyama-shi, Ehime 790-8567

*Total SM & GMS of Aeon group.

Figure A-2: Top 10 Department Stores (2003)

Rank	Company Name	Sales US$ bil.	*No. of Outlets	Location	Telephone/Fax URL	Address
1	Takashimaya	10	20	Nationwide	Tel: 81(0)6-6631-1101 Fax: 81(0)6-6632-5195 www.takashimaya.co.jp	5-1-5 Namba, Chuo-ku, Osaka 542-8510
2	Mitsukoshi	8	18	Nationwide	Tel: 81(0)3-3241-3311 Fax: 81(0)3-3242-4559 www.mitsukoshi.co.jp	1-4-1 Nihonbashi-Muromachi, Chuo-ku, Tokyo 103-8001
3	Daimaru	7	16	Nationwide	Tel: 81(0)6-6271-1231 Fax: 81(0)6-6245-1343 www.daimaru.co.jp	1-7-1 Shinsaibashi-Suji, Chuo-ku, Osaka 542-8501
4	Isetan	5	11	Kanto	Tel: 81(0)3-3352-1111 Fax: 81(0)3-5273-5321 www.isetan.co.jp	3-14-1, Shinjyuku, Shinjyuku-ku, Tokyo, 160-8011
5	Marui	5	31	Kanto	Tel: 81(0)3-3384-0101 Fax: 81(0)3-5343-6615 www.0101.co.jp	4-3-2 Nakano, Nakano-ku Tokyo 164-8701
6	Tokyu	4	11	Kanto	Tel: 81(0)3-3477-3111 Fax: 81(0)3-3496-7200 www.tokyu-depart.co.jp	2-24-1 Dogenzaka, Shibuya-ku Tokyo 150-8019

7	Kintetsu	4	6	Kinki	Tel: 81(0)6-6624-1111 Fax: 81(0)6-6622-8656 www.d-kintetsu.co.jp	1-1-43 Abenosuji, Abeno-ku Osaka 545-8545
8	Hankyu	3	11	Kinki, Kanto	Tel: 81(0)6-6361-1381 Fax: 81(0)6-6486-6048 www.hankyu-dept.co.jp	8-7 Kakuta-cho, Kita-ku Osaka 530-8350
9	Matsuzakaya	3	10	Nationwide	Tel: 81(0)52-251-1111 Fax: 81(0)52-264-7140 www.matsuzakaya.co.jp	3-16-1 Sakae, Naka-ku, Nagoya 460-8430
10	Parco	2	19	Nationwide	Tel: 81(0)3-3477-5710 Fax: 81(0)3-3477-5803 www.parco.co.jp	4-3, Utagawa-cho, Shibuya-ku, Tokyo, 150-0042

*Domestic Outlets only.

Figure A-3: Top 10 Convenience Stores (2003)

Rank	Store Name (Parent)	Sales US$ bil	No. of Outlets	Location	Telephone/Fax URL	Address
1	Seven-Eleven (Ito-Yokado)	15	10,017	Nationwide	Tel: 81(0)3-3459-3711 Fax: 81(0)3-3459-6609 www.sej.co.jp	4-1-4 Shibakoen, Minato-ku, Tokyo 105-0011
2	Lawson (Mitsubishi)	9	7,625	Nationwide	Tel: 81(0)3-5476-6800 Fax: 81(0)3-5440-7621 www.lawson.co.jp	4-9-25 Shibaura, Minato-ku, Tokyo 108-8563
3	Family Mart (Itochu)	6	9,679	Nationwide	Tel: 81(0)3-3989-6600 Fax: 81(0)3-5396-1810 www.family.co.jp	4-26-10 Higashi-Ikebukuro, Toshima-ku, Tokyo 170-8404
4	Sunkus** (Uny)	5	3,270	Nationwide	Tel: 81(0)3-5445-3456 Fax: 81(0)3-5445-3466 www.sunkus.co.jp	2-28-2 Shiba, Minato-ku, Tokyo 105-8539
5	Circle-K** (Uny)	4	2,971	Kanto, Chubu, Kinki	Tel: 81(0)587-24-9500 Fax: 81(0)587-24-9503 www.circlek.co.jp	1 Gotanda-Cho, Amaike, Inazawa-shi, Aichi 492-8685
6	Daily Yamazaki (Yamazaki)	2	2,160	Nationwide	Tel: 81(0)47-323-0001 Fax: 81(0)47-324-0082 www.daily-yamazaki.co.jp	Sun Plaza 35 Bldg., 1-9-2 Ichikawa, Ichikawa-shi, Chiba 272-8530
7	Mini-Stop (AEON)	2	1,638	Kanto, Tokai, Kinki	Tel: 81(0)3-3294-9749 Fax: 81(0)3-3294-9791 www.ministop.co.jp	1-1 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054
8	AM/PM (Japan Energy)	2	1,365	Nationwide	Tel: 81(0)3-5211-3600 Fax: 81(0)3-5211-3593 www.ampm.co.jp	13-1 Ichibancho, Chiyoda-ku Tokyo 102-0082
9	Seicomart	1	1,007	Hokkaido	Tel: 81(0)11-511-2796 Fax: 81(0)11-511-2834 www.seicomart.co.jp	Park 9-5 Bldg., Nishi 6, Minami 9, Chuo-ku, Sapporo 064-8620
10	Poplar	1	895	Nationwide	Tel: 81(0)82-837-3500 Fax:81(0)82-837-3540 http://www.poplar-cvs.co.jp/	655-1, Ooazahisaji, Asa-cho, Asakita-ku, Hioroshima 731-3395

*Sales of total shops (owned-store, franchised-store, and area franchised-store).
**Sunkus and Circle K plan to merge as of Sep. 2004.

Figure A-4: Top 10 Food Wholesalers (2003)

Rank	Company Name	Sales US$ bil	Location	Telephone/Fax URL	Address
1	Kokubu	11	Nationwide	Tel: 81(0)3-3276-4000 Fax: 81(0)3-3271-6523 www.kokubu.co.jp	1-1-1 Nihonbashi, Chuo-ku, Tokyo 103-8241
2	Ryoshoku	9	Nationwide	Tel: 81(0)3-3767-5111 Fax: 81(0)3-3767-0424 www.ryoshoku.co.jp	6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556
3	Snow Brand Access	6	Nationwide	Tel: 81(0)3-3410-4372 Fax: 81(0)3-3410-4626 www.yuki-access.co.jp	3-1-1 Nozawa, Setagaya-ku, Tokyo 154-8501

4	Itochu Foods	5	Nationwide	Tel: 81(0)6-6204-5901 Fax: 81(0)6-6204-5970 www.itochu-shokuhin.com	2-1-6 Koraibashi, Chuo-ku, Osaka 541-8578
5	Mitsui Shokuhin	5	Nationwide	Tel: 81(0)3-3551-1211 Fax: 81(0)3-5541-7467 www.sanyu-koami.co.jp	1-25-12 Shinkawa, Chuo-ku, Tokyo 104-8286
6	Kato Sangyo	5	Nationwide	Tel: 81(0)798-33-7650 Fax:81(0)798-22-5637 www.katosangyo.co.jp	9-20, Matsubara-cho, Nishinomiya-shi, Hyogo 662-8543
7	Meidi-ya	4	Nationwide	Tel: 81(0)3-3271-1111 Fax: 81(0)3-3273-6360 www.meidi-ya.co.jp	2-2-8, Kyobashi, Chuo-ku, Tokyo 104-8302
8	Nihon Shurui Hanbai	4	Nationwide	Tel: 81(0)3-3273-1817 www.nishuhan.co.jp	2-2-1, Yaesu, Chuo-ku Tokyo 104-0028
9	Asahi Foods	3	Kyusyu-Kanto	Tel: 81(0)88-882-7111 www.asask.co.jp	2-15-5, Minami Harimaya-cho, Kochi-city, Kochi, 780-8505
10	Nishino	3	Nationwide	Tel: 81(0)3-3843-0231 Fax: 81(0)3-3843-6771 www.nishino.co.jp	Nihon Seimei Ueno bldg. 5-2-2 Higashi Ueno, Taito-ku, Tokyo 110-8624

Soureces: Nikkei Marketing Journal “The Ranking 2003”, and company annual reports. Sales are shown by connection base.

Appendix B. Japanese Food Service Companies

*2003 Average Exchange Rate of Y115.92 is used for both Appendix A and B

Figure B-1: Top 10 Commercial Restaurant Food Service Companies (2003)

Rank	Company Name	Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	McDonald's Japan	3.3	3,773	Nationwide	Tel: 81(0)3-3344-6251 Fax: 81(0)3-3344-6769 www.mcdonalds.co.jp	6-5-1 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163-1339
2	Skylark	2.4	2,450	Nationwide	Tel: 81(0)422-51-8111 Fax:81(0)422-37-5240 www.skylark.co.jp	1-25-8 Nishi-Kubo, Musashino-shi, Tokyo 180-8580
3	Monteroza	1.14	1,106	Nationwide	Tel: 81(0)422-36-8888 Fax: 81(0)422-36-8988 www.monteroza.co.jp	1-17-3 Nakamachi, Musashino-shi, Tokyo 180-0006
4	Duskin (Mister Donut)	1.1	1,319	Nationwide	Tel:81(0)6-6821-5006 Fax: 81(0)6-6821-5357 www.duskin.co.jp	1-33 Toyotsu-cho, Suita-shi, Osaka 564-0051
5	Kentucky Fried Chicken Japan	1.09	1,494	Nationwide	Tel: 81(0)3-3719-0231 Fax: 81(0)3-5722-7240 japan.kfc.co.jp	1-15-1 Ebisu-Minami, Shibuya-ku, Tokyo 150-8586
6	Royal (Royal Host)	1.05	501	Nationwide	Tel: 81(0)92-471-2479 Fax: 81(0)92-471-2525 www.royal.co.jp	3-28-5 Naka, Hakata-ku, Fukuoka 816-0093
7	Mos Food Services	0.9	1,476	Nationwide	Tel: 81(0)3-3266-7171 Fax: 81(0)3-3266-7110 www.mos.co.jp	22, Tansu-machi, Shinjuku-ku, Tokyo 162-8501
8	Yoshinoya D&C	0.87	992	Nationwide	Tel: 81(0)3-5269-5111 Fax: 81(0)3-5269-5090 www.yoshinoya-dc.com	4-3-17 Shinjuku, Shinjuku-ku, Tokyo 160-0022
9	Reins International	0.84	1,188	Nationwide	Tel: 81(0)3-5775-2001 Fax: 81(0)3-5770-3001 www.reins.co.jp/	Roppongi Hills Mori Tower 29F, 6-10-1, Roppongi, Minato-ku, Tokyo 106-6129
10	Denny's Japan	0.8	571	Kanto, Tokai	Tel: 81(0)3-3459-3501 Fax: 81(0)3-3459-3558 www.dennys.co.jp	4-1-4 Shiba-koen, Minato-ku, Tokyo 105-8571

Figure B-2: Top 10 Hotel/Resort Food Service Companies (2003)

Rank	Company Name	Food Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Prince Hotels	0.47	83	Nationwide	Tel: 81(0)3-3498-1111 Fax: 81(0)3-3498-1113 www.princehotels.co.jp	6-35-1 Jingumae, Shibuya-ku, Tokyo 150-0001
2	Imperial Hotel	0.27	3	Tokyo,Osaka, Kamikochi	Tel: 81(0)3-3504-1111 Fax: 81(0)3-3581-9146 www.imperialhotel.co.jp	1-1-1 Uchi-Sawaicho, Chiyoda-ku, Tokyo 100-8558
3	New Otani Hotels	0.24	29	Nationwide	Tel: 81(0)3-3265-1111 Fax: 81(0)3-3221-2619 www.newotani.co.jp	4-1 Kioicho, Chiyoda-ku, Tokyo 102-8578
4	Fujita Kanko	0.2	49	Nationwide	Tel: 81(0)3-3433-5154 Fax: 81(0)3-3433-5197 www.fujita-kanko.co.jp	1-9-15 Kaigan, Minato-ku, Tokyo 105-8551
5	Keio Plaza Hotel	0.15	4	Tokyo, Sapporo	Tel: 81(0)3-3344-0111 Fax: 81(0)3-3345-8269 www.keioplaza.co.jp	2-2-1 Nishi Shinjuku, Shinjuku-ku, Tokyo 160-8330
6	Dai-ichi Hankyu Hotels	0.15	N/A	Kinki	www.dhh.jp	19-19, Chaya-machi, Kita-ku, Osaka-shi, Osaka

7	Resort Trust	0.14	34	Nationwide	Tel: : 81(0)52-933-6000 www.resorttrust.co.jp	2-18-31, Higashisakura, Naka-ku, Nagoya, 460-8490
8	Mitsui Kanko Group	0.13	18	Nationwide	Tel: 81(0)3-3297-8831 www.mitsuikanko.co.jp	1-26-9, Shinkawa, Chuo-ku, Tokyo, 104-0033
9	Rihga Royal Hotels	0.12	N/A	Nationwide	Tel: 81(0)6-6448-2898/Fax: 81(0)6-6448-3921 www.rihga.com	5-3-68, Nakanoshima, Kita-ku, Osaka, 530-0005
9	Washington Hotel	0.12	N/A	Nationwide	http://www.washingtonhotel.co.jp/index.html	N/A

Figure B-3: Top 5 Institutional Food Service Companies (2003)

Rank	Company Name	Sales US$ bil.	Location	Telephone/Fax URL	Address
1	Nisshin Healthcare Food Service	1.18	Nationwide	Tel: 81(0)3-3230-2235 Fax: 81(0)3-3237-4923 www.nifs.co.jp	Kioicho Bldg. 16F, 3-12 Kioicho, Chiyoda-ku, Tokyo 102-8545
2	Shidax Food Service	1.02	Nationwide	Tel: 81(0)3-5908-1361 Fax: 81(0)3-5908-1360 www.shidax.co.jp	3-7-1 Nishi-Shinjuku Shinjuku-ku, Tokyo 163-1036
3	Seiyo Food Systems	0.57	Nationwide	Tel: 81(0)3-3984-0281 Fax: 81(0)3-3983-3475 www.seiyofood.co.jp	3-13-3, Higashi Ikebukuro, Toshima-ku, Tokyo, 170-0013
4	Aim Services	0.55	Nationwide	Tel: 81(0)3-3592-3721 Fax: 81(0)3-3502-6580 www.aimservices.co.jp	1-1-15 Nishi-Shimbashi, Minato-ku, Tokyo 105-0003
5	Green House	0.47	Nationwide	Tel: 81(0)3-3379-1211 Fax: 81(0)3-3370-9280 www.greenhouse.co.jp	3-20-2 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163-1477

Figure B-4: Top 5 Home Meal Replacement Sector and Bento Producers/Marketers (2003)

Rank	Company Name	Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Plenus (Hokka hokka tei)	1.7	3,519	Nationwide	Tel: 81(0)3-3456-6601 Fax. 81(0)3-3456-6644 www.hurxley.co.jp	Sumitomo Shibaura Bldg. 3F, 4-16-36 Shibaura, Minatoku, Tokyo 108-0023
2	Honke Kamadoya	1.04	2,570	Nationwide	Tel: 81(0)78-251-2308 Fax: 81(0)78-251-3146 www.honkekamadoya.co.jp	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097
3	Kozosushi Chain	0.5	1,348	Nationwide	Tel: 81(0)3-3988-0541 www.kozosushi.co.jp	3-13-10, Minami Ikebukuro, Toshima-ku, Tokyo 171-0022
4	Origin Toshu	0.35	548	Nationwide	Tel: 81(0)3-3305-0180 Fax: 81(0)3-3305-0330 www.toshu.co.jp	3-2-4 Sengawacho, Chofu, Tokyo 182-0002
5	Rock Field	0.34	N/A	Nationwide	Tel: 81(0)3-3526-6195 Fax: 81(0)3-3526-6356 www.rockfield.co.jp	Maruishi Dai-Ni Bldg., 1-9-16, Kajimachi, Chiyoda-ku, Tokyo 101-0044

Note: All sales shown in Appendixes B have been taken from Nikkei Marketing Journal "The 30th Survey of Japan's Food Companies Ranking", and company annual reports.

Appendix C. Japanese Food Manufacturers

Fig C-1
Broad-line

Company Name	Sales US$ bil.	Main Product
Japan Tobacco	36	Tobacco, beverage
Kirin Breweries	13	Beer, beverage
Asahi Breweries	11	Beer, beverage
Ajinomoto	8	Seasonings
Nippon Ham	7	Processed Meat

Fig C-2
Frozen Foods

Company Name	Share	Main Products
Nichirei	15.8%	Fried Rice & Vegetables
Katokichi	12.4%	Fried Shrimp
Ajinomoto	8.5%	Fried Rice & Vegetables
Nichiro	7.8%	Seafood
Nippon Suisan	7.3%	Seafood

Fig C-3
Ham & Sausage

Company Name	Share	Main Products
Nippon Ham	21.6%	Meat
Itoham Foods	20.4%	Ham, Sausages & Meat
Marudai Food	14.9%	Ham & Sausages
Prima Meat Pcakers	11.8%	Meat
Yonekyu	5.0%	Meat Products

Fig C-4
Ice cream

Company Name	Share	Main Product
Ezaki Glico	13.0%	Snack
Morinaga Milk Industry	12.3%	Milk & Yogurt
Meiji Dairies	12.3%	Dehydrated Milk
Haagen-daz	11.7%	Ice cream
Lotte	10.1%	Snack

Fig C-5 Pasta		
Company Name	Share	Main Product
Nisshin Seifun Group	30.0%	Flour
Nippon Flour Mills	23.3%	Flour
Showa Sangyo	7.8%	Instant Noodles
Hagoromo Foods	7.1%	Instant Noodles
Okumoto Flour Milling	3.3%	Flour

Fig C-6 Instant Noodle		
Company Name	Share	Main Product
Nisshin Seifun Group	41.7%	Flour
Toyo Suisan	17.6%	Seafood
Sanyo Foods	14.1%	Instant Noodles
Myojo Foods	10.0%	Instant Noodles
Acecook	5.8%	Instant Noodles

Fig C-7 Beer		
Company Name	Share	Main Product
Asahi	38.4%	Beer
Kirin Breweries	36.2%	Beer
Sapporo Breweries	14.1%	Beer
Suntory	10.5%	Spirits, Wine, Beer
Orion Beer	0.8%	Shochu

Fig C-8 Non-Alcoholic Beverages		
Company Name	Share	Main Product
Coca-Cola	31.6%	Non-alcoholic drinks
Suntory	17.5%	Non-alcoholic drinks
Kirin Beverage	9.7%	Non-alcoholic drinks
Ito En	6.2%	Green Tea
Otsuka Pharmaceutical	5.9%	Green Tea

Fig C-9 Baking		
Company Name	Sales US$ bil	Main Product
Yamazaki Baking	5.75	Baking
Shikishima Baking	1.09	Baking
First Baking	0.51	Baking
Nakamuraya	0.32	Baking and Sweets
Nichiryo Baking	0.18	Baking

Fig C-10 Seafood		
Company Name	Sales US$ bil	Main Product
Maruha	6.40	Seafood, Processed food
Nippon Suisan	3.97	Seafood, Processed food
Nichiryo	2.17	Seafood, Processed food
Kyokuyo	1.29	Seafood, Processed food
Hosui	0.17	Seafood

Appendix C Sources: Nikkei “The Ranking 2002”, “2002 Commodities’ Share”, company annual reports.

Appendix D. Key Contacts

Figure D-1: U.S. Government

Organization Name	Telephone/Fax URL	Address
Agricultural Trade Office American Embassy, Tokyo	Tel: 81(0)3-3505-6050 Fax: 81(0)3-3582-6429 www.atojapan.org atotokyo@fas.usda.gov	Toshin Tameike Bldg 8F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Agricultural Trade Office American Consulate-General, Osaka	Tel: 81(0)6-6315-5904 Fax: 81(0)6-6315-5906 www.atojapan.org atoosaka@fas.usda.gov	2-11-5 Nishi-Tenma Osaka 530-8543
ATO's GAF Market B-to-B website	http://www.greatamericanfood.info/	2-11-5 Nishi-Tenma Osaka 530-8543
Agricultural Affairs Office, American Embassy, Tokyo	Tel: 81(0)3-3224-5105 Fax: 81(0)3-3589-0793 agtokyo@fas.usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
American Embassy Tokyo, Japan	Tel: 81(0)3-3224-5000 Fax: 81(0)3-3505-1862 usembassy.state.gov/tokyo/	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Animal and Plant Health Inspection Service (APHIS)	Tel: 81(0)3-3224-5111 Fax: 81(0)3-3224-5291 www.aphis.usda.gov	1-10-5 Akasaka, Minato-ku, Tokyo 107-8420
FAS Washington	www.fas.usda.gov	1400 Independence Ave., SW Washington, DC 20250
USDA Washington	www.usda.gov	1400 Independence Ave., SW Washington, DC 20250

Figure D-2: U.S. State Government Offices in Japan

Organization Name	Telephone/Fax URL	Address
Alabama	Tel: 81(0)3-5232-3851 Fax: 81(0)3-5232-3850 www.ado.state.al.us	Aoki Bldg. 8F, 5-32-8 Shiba Minato-ku, Tokyo 108-0014
Alaska	Tel: 81(0)3-3556-9621 Fax:03-3556-9623 www.alaska.or.jp	Room 307 Central Bldg. 22-1, Ichibancho Chiyoda-ku, Tokyo 102-0082
Arizona	Tel: 81(0)3-5421-0845 Fax: 81(0)3-5421-0845 http://www.azcommerce.com/itrade	AIOS Hiroo Bldg. 5F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Arkansas	Tel: 81(0)3-5447-7471 Fax: 81(0)3-5447-7472 www.1-800-arkansas.com	AIOS Hiroo Bldg. 8F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Colorado	Tel: 81(0)3-5272-1041 Fax: 81(0)3-3207-6685 www.colorado.japan.org	2-3-26 Nishi-Waseda Shinjuku-ku, Tokyo 169-0051
Delaware	Tel: 81(0)3-5326-3494 Fax: 81(0)3-5326-3480 www.delaware.gov	Park Tower Bldg. 30F 3-7-1, Nishishinjuku, Shinjuku-ku, Tokyo 163-1030
Florida	Tel: 81(0)3-3230-1821 Fax: 81(0)3-5213-8169 www.eflorida.com	3-1-1 Kojimachi Chiyoda-ku, Tokyo 102-0083
Georgia	Tel: 81(0)3-3539-1676 Fax: 81(0)3-3504-8233 www.georgia.org	2-7-16 Toranomon, Minato-ku, Tokyo 105-0001
Illinois	Tel: 81(0)3-3268-8011 Fax:81(0)3-3268-8700 www.commerce.state.il.us	2-1 Ichigaya, Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Indiana	Tel: 81(0)45-228-0625 Fax: 81(0)45-211-1192 www.venture-web.or.jp/indiana/	1-1 Sakuragicho Naka-ku, Yokohama 231-0062
Iowa	Tel: 81(0)3-3222-6901 Fax: 81(0)3-3222-6902 www.smart.state.ia.us	Room 903 Central Bldg, 22-1 Ichibancho Chiyoda-ku, Tokyo 102-0082
Kansas	Tel: 81(0)3-3239-2844 Fax: 81(0)3-3239-2848 www.kansascommerce.com	Kioicho WITH Bldg 4F, 3-32 Kioicho Chiyoda-ku, Tokyo 102-0094
Kentucky	Tel: 81(0)3-3582-2334 Fax: 81(0)3-3588-1298 www..kentucky-net.com	2-5-8 Akasaka Minato-ku, Tokyo 107-0052
Michigan	Tel: 81(0)45-290-3650 Fax: 81(0)45-290-3605 www.michigan.org	1-2-20 Hiranuma Nishi-ku, Yokohama, Kanagawa 220-0023

Minnesota	Tel: 81(0)3-5434-3991 Fax: 81(0)3-5740-6433 www.dted.state.mn.us	7-3-16 Nishi-Gotanda Shinagawa-ku, Tokyo 141-0031
Mississippi	Tel: 81(0)45-222-2047 Fax: 81(0)45-222-2048 www.mississippi.org	Yokohama World Porters 6F, 2-2-1 Shinko Naka-ku, Yokohama 231-0001
Missouri	Tel: 81(0)3-3586-1496 Fax: 81(0)3-3586-1498 www.ecodev.state.us.mo	S-303, Ark Executive Tower, 1-14-5 Akasaka Minato-ku, Tokyo 107-0052
New Jersey	Tel: 81(0)3-3213-5330 Fax: 81(0)3-3213-5336 www.state.nj.us	Kokusai Bldg. Suite 238, 3-1-1 Marunouchi Chiyoda-ku, Tokyo 100-0005
New York	Tel: 81(0)3-3503-5196 Fax: 81(0)3-3509-1020 www.empire.state.ny.us	Mori Bldg 6F, 2-6-4 Toranomon Minato-ku, Tokyo 105-0001
North Carolina	Tel: 81(0)3-3435-9301 Fax: 81(0)3-3435-9303 www.commerce.state.nc.us	Suzuki Bldg 5F, 3-20-4 Toranomon Minato-ku, Tokyo 105-0001
Ohio	Tel: 81(0)3-3262-1312 Fax: 81(0)3-3239-6477 www.state.oh.us	Hirakawacho Bldg 7F, 2-6-1 Hirakawacho Chiyoda-ku, Tokyo 102-0093
Oregon	Tel: 81(0)3-3580-8951 Fax: 81(0)3-3580-9071 www.state.or.us	Shimbashi Hara Bldg. 3F, 2-10-5 Shimbashi Minato-ku, Tokyo 105-0004
Pennsylvania	Tel: 81(0)3-3505-5107 Fax: 81(0)3-5549-4127 www.pa-japan.org	KY Bldg 7F, 3-16-14, Roppongi Minato-ku, Tokyo 106-0032
South Carolina	Tel: 81(0)3-5408-5461 Fax: 81(0)3-5408-5462 www.myscgov.com	Annex 2-Gokan 5F, 3-8-27 Toranomon Minato-ku, Tokyo 105-0001
Tennessee	Tel: 81(0)45-222-2041 Fax: 81(0)45-222-2043 www.state.tn.us	Yokohama World Porters 6F, 11 Shinko-cho Naka-ku, Yokohama 231-0001
Texas	Tel: 81(0)3-3589-6627 Fax: 81(0)3-3589-6638 www.state.tx.us	1 Azabu-Nagasaka, Minato-ku, Tokyo 106-0043
Virginia	Tel: 81(0)3-3539-3661 Fax: 81(0)3-3539-3669 www.yesvirginia.org	Imperial Tower 8F, 1-1-1 Uchisaiwaicho Chiyoda-ku, Tokyo 100-0011
Washington	Tel: 81(0)3-3459-0896 Fax: 81(0)3-3459-0897 www.trade.wa.gov	5-4-8-301 Toranomon Minato-ku, Tokyo 105-0001
West Virginia	Tel: 81(0)52-953-9798 Fax: 81(0)52-953-9795 www.wv-jp.net	3-24-17 Nishiki Naka-ku, Nagoya 460-0003

Figure D-3: U.S. Trade Associations and Cooperator Groups in Japan

Organization Name	Telephone/Fax URL	Address
Alaska Seafood Marketing Institute	Tel: 81(0)3-3990-1767 Fax: 81(0)3-3990-4725 www.alaskaseafood.org	5-5-10-207, Tagara, Nerima-ku Tokyo, 179-0073
Almond Board of California	Tel: 81(0) Fax: 81(0) www.almond.org	Effective 9/17/04, Hill & Knowlton will be representing ABC.
American Seafood Institute	Tel: 81(0)3-3990-1767 Fax: 81(0)3-3990-4725 http://www.americanseafood.org	5-5-10-207, Tagara, Nerima-ku Tokyo, 179-0073
American Soybean Association	Tel: 81(0)3-5563-1414 Fax: 81(0)3-5563-1415 http://www.asajapan.org/	Toshin Tameike Bldg.7F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Asparagus, USA	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5413-7321 www.calasparagus.com	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Blue Diamond Growers	Tel: 81(0)3-3506-8877 Fax: 81(0)3-3506-8883 www.bluediamond.com	Toranomon NS Bldg 3F, 1-22-15 Toranomon Minato-ku, Tokyo 105-0001
California Cherry Advisory Board	Tel: 81(0)45-641-3111 Fax: 81(0)45-663-1646 www.calcherry.com	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
California Fig Advisory Board	Tel: 81(0)3-5766-2753 Fax: 81(0)3-5766-2738 www.californiafigs.com	#2 Takachiho Bldg, 2F, 1-6-9, Shiba Daimon, Minato-ku, Tokyo 105-0012
California Nectarine & Fresh Prune Commission	Tel: 81(0)45-641-3111 Fax: 81(0)45-663-1646 www.caltreefruit.com	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
California Pistachio Commission	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5413-7321 www.pistachios.org	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051

California Prune Board	Tel: 81(0)3-3584-0866 Fax: 81(0)3-3505-6353 www.californiadriedplums.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Strawberry Commission	Tel: 81(0)3-3588-1454 Fax: 81(0)3-3505-6353 www.calstrawberry.com	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Table Grape Commission	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.tablegrape.com	Seibundo Bldg, 5F, 1-5-9, iidabashi, Chiyoda-ku Tokyo, 102-0072
California Walnut Commission	Tel: 81(0)3-3588-1454 Fax: 81(0)3-3505-6353 www.walnuts.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Cherry Marketing Institute	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5413-7321 www.cherrymkt.com/	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Cranberry Marketing Committee	Tel: 81(0)45-641-3111 Fax: 81(0)45-663-1646 www.uscranberries.com	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
Dairy Export Council, U.S.	Tel: 81(0)3-3505-5737 Fax: 81(0)3-3505-6353 www.usdec.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Dry Pea & Lentil Council, USA	Tel: 81(0)3-3288-0282 Fax: 81(0)3-3288-0283 (n.a.)	3-3-17 Kudan Minami Chiyoda-ku, Tokyo 102-0074
Florida Department of Citrus	Tel: 81(0)3-3584-7019 Fax: 81(0)3-3582-5076 www.floridajuice.com	Suite 310, 1-11-36 Akasaka Minato-ku, Tokyo 107-0052
Grains Council, U.S.	Tel: 81(0)3-3505-0601 Fax: 81(0)3-3505-0670 www.grains.org	Toshin Tameike Bldg. 7F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Hawaii Papaya Industry Association	Tel: 81(0)3-3888-4224 Fax: 81(0)3-3888-3643 (n.a.)	Koyo Bldg, 11-8 Sekiyacho, Senju Adachi-ku, Tokyo 120-0024
Idaho Potato Commission	Tel: 81(0)3-5766-2753 Fax: 81(0)3-5766-2738 www.idahopotatoes.com	#2 Takachiho Bldg, 2F, 1-6-9, Shiba Daimon, Minato-ku, Tokyo 105-0012
Meat Export Federation, U.S. (Tokyo Office)	Tel: 81(0)3-3584-3911 Fax: 81(0)3-3587-0078 www.americanmeat.jp	Toshin Tameike Bldg. 7F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Meat Export Federation, U.S. (Osaka Office)	Tel: 81(0)6-6315-5105 Fax: 81(0)6-6315-5103 www.americanmeat.jp	c/o American Consulate-General 10F 2-11-5 Nishitenma, Kita-ku, Osaka 530-8543
National Dry Bean Council	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 (n.a.)	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
National Honey Board	Tel: 81(0)3-3438-3361 Fax: 81(0)3-3438-3672 www.nhb.org/, www.nhb.jp/	#2 Takachiho Bldg, 2F, 1-6-9, Shiba Daimon, Minato-ku, Tokyo 105-0012
National Peanut Board	Tel: 81(0)3-5721-2521 Fax:81(0)3-5721-2591 www.nationalpeanutboard.com	Matsuura Bldg. 1-18-3, Ebisu Minami, Shibuya-ku, Tokyo 150-0022
Northwest Cherry Growers	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5413-7321 www.nwcherries.com	Moto Akasaka Bldg, 9F, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Pet Food Institute	Tel: 81(0)3-3486-6841 Fax: 81(0)3-3486-0584 www.petfoodinstitute.org	TOTATE International Bldg, 2-12-19 Shibuya Shibuya-ku, Tokyo 150-8343
Potato Board, U.S.	Tel: 81(0)3-3505-5737 Fax: 81(0)3-3505-6353 www.potatoesusa-japan.com	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Poultry and Egg Export Council, USA	Tel: 81(0)3-3534-9295 Fax: 81(0)3-3534-9293 www.usapeec.org	1-11-6-911, Tsukuda, Chuo-ku, Tokyo 104-0051
Raisin Administrative Committee	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.raisins-jp.org	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
Rice Federation, USA	Tel: 81(0)3-3505-5752 Fax: 81(0)3-3505-6353 www.usarice.com	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Sunkist Pacific Ltd.	Tel: 81(0)3-3523-0717 Fax: 81(0)3-3523-0710 www.sunkist.com	New River Tower, 8F, 1-6-11, Shinkawa, Tyuo-ku, 104-0033
Wheat Associates, U.S.	Tel: 81(0)3-3582-7911 Fax: 81(0)3-3582-7915 www.uswheat.org	Toshin Tameike Bldg.5F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Wild Blueberry Association of North America	Tel: 81(0)3-5766-2753 Fax: 81(0)3-5766-2738 www.wildblueberries.com	#2 Takachiho Bldg, 2F, 1-6-9, Shiba Daimon, Minato-ku, Tokyo 105-0012
Wine Institute of California	Tel: 81(0)3-3707-8960 Fax: 81(0)3-3707-8961 www.wineinstitute.org	2-24-6-403 Tamagawa Setagaya-ku, Tokyo 158-0094

Figure D-4: U.S. Laboratories Approved by the Japanese Government

Organization Name	Telephone/Fax URL	Address
California Export Laboratory Services, California Department of Food and Agriculture, Center for Analytical Chemistry	Tel: 916-262-1434 Fax: 916-262-1572 www.cdfa.ca.gov/is/cac/	3292 Meadowview Rd. Sacramento, CA 95832
Oregon Department of Agriculture, Export Service Center	Tel: 503-872-6630 Fax: 503-872-6615 www.oda.state.or.us/lab/esc.html	1207 NW Naito Prkway #224 Portland, OR 97209-2851
ABC Research Corporation	Tel: 904-372-0436 Fax: 904-378-6483 www.abcr.com	3437 SW 24th Ave. Gainesville, FL 32602
ACTS Testing Labs	Tel: 716-505-3300 Fax: 716-505-3301 www.mtl-acts.com	100 Northpoint Parkway Buffalo, NY 14228-1884
ANRESCO, Inc.	Tel: 415-822-1100 Fax: 415-822-6615 www.anresco.com	1370 Van Dyke Ave. San Francisco, CA 94124-3313
Bolin Laboratories, Inc.	Tel: 602-942-8220 Fax: 602-942-1050 (n.a.)	17631 N. 25th Ave. Phoenix, AZ 85023
Cargill Analytical Services Laboratory	Tel: 417-451-5973 Fax: 417-451-5478 www.cargill.com	Crowder Industrial Park, 4301 Doniphane Dr. Neosho, MO 64850
Central Analytical Laboratories, Inc	Tel: 504-393-5290 Fax: 504-393-5270 www.centralanalytical.com	101 Woodland Hwy. Belle Chasse, LA 70037
Certified Laboratories, Inc.	Tel: 516-576-1400 Fax: 516-576-1410 www.800.certlab.com	200 Express Street, Plainview, NY 11803
Certified Laboratories of California, Inc	(n.a.)	1156 N.Fountain Way #D, Anaheim, CA 92806
Columbia Food Laboratories, Inc.	Tel: 503-695-2287 Fax: 503-695-5187 www.columbiafoodlab.com	36740 E. Historic Columbia River Hwy. P.O. Box 353 Corbett, OR 97019
Covance Laboratory	Tel: 888-268-2623 Fax: 608-241-7227 www.covance.com/analytical	3301 kinsman Blvd. Madison, WI 53704
Food Products Laboratory, Inc.	Tel: 503-253-9136 Fax: 503-253-9019 www.fplabs.com	12003 NE Ainsworth Cir., Suite 105 Portland, OR 97220-1099
Irvine Analytical Laboratories, Inc.	Tel: 877-445-6554 Fax: 949-951-4909 ialab.com	10 Vanderbilt Dr. Irvine, CA 92618
Midwest Research Institute	Tel: 816-753-7600 Fax: 816-753-8420 www.mriresearch.org	425 Volker Blvd. Kansas City, MO 64110-2299
Michelson Laboratories	Tel: 562-928-0553 Fax: 562-927-6625 www.michelsonlab.com	6280 Chalet Dr. Commerce, CA 90040-3761
Mictobac Laboratories, Inc.	Tel: 909-734-9600 Fax: 909-734-2803 www.microbac.com	280 North Smith Ave Corona, CA 91720
The National Food Laboratory, Inc.	Tel: 925-828-1440 Fax: 925-933-9239 www.thenfl.com	6363 Clark Ave. Dublin, CA 94568-3097
OMIC USA, Inc.	Tel: 503-223-1497 Fax: 503-223-9436 www.omicusa.com	1200 NW Front Ave., Suite 100 Portland, OR 97209
Primus Laboratories	Tel: 805-922-0055 Fax: 805-922-2462 www.primuslabs.com	2810 Industrial Parkway Santa Maria, CA 93455
Silliker Laboratories of Illinois, Inc.	Tel: 708-957-7878 Fax: 708-957-8449 www.silliker.com	900 Maple Road, Homewood, IL 60430
West Coast Food Center	Tel: 503-254-5143 Fax: 503-254-1452 www.wcfc.com	12423 NE Whitaker Way Portland, OR 97230

Figure D-5: Japanese Government

Organization Name	Telephone/Fax URL	Address
Japan External Trade Organization (JETRO)	Tel: 81(0)3-3582-5521, Fax: 81(0)3-3582-0504 www.jetro.go.jp	2-2-5 Toranomon Minato-ku, Tokyo 105-8466
Min. of Agriculture, Forestry and Fisheries	Tel: 81(0)3-3502-8111 www.maff.go.jp	1-2-1 Kasumigaseki Chiyoda-ku, Tokyo 100-0013
Ministry of Health, Labor and Welfare	Tel: 81(0)3-5253-1111 www.mhlw.go.jp	1-2-2 Kasumigaseki Chiyoda-ku, Tokyo 100-0013
Zen-noh (JA)	Tel: 81(0)3-3245-7854 Fax: 81(0)3-3245-7444 www.zennoh.or.jp	1-8-3 Otemachi Chiyoda-ku, Tokyo 100-004
JETRO Atlanta	Tel: 404-681-0600 Fax:404-681-0713 www.jetroatlanta.org	245 Peachtree Center Avenue, Suite 2208 Atlanta, GA30303
JETRO Chicago	Tel: 312-832-6000 Fax: 32-832-6066 www.jetrocgo.org	401 North Michigan Avenue, Suite 660 Chicago, IL. 60611
JETRO Denver	Tel: 303-629-0404 Fax: 303-893-9533 www.jetro.go.jp/usa/denver	1200 Seventeenth Street, Suite 1110 Denver, CO 80202
JETRO Houston	Tel: 713-759-9595 Fax: 713-759-9210 www.jetro.go.jp/usa/houston	1221 McKinney, Suite 2360 Houston, TX 77010
JETRO Houston Dallas Branch	Tel: 214-651-0839 Fax: 214-651-1831 (n.a.)	Suite 152-1, World Trade Center 2050 Stemmons Freeway, Dallas, TX 75207
JETRO Los Angeles	Tel: 213-624-8855 Fax: 213-629-8127 www.jetro.org/losangeles	777 South Figueroa Street, Suite 4900 Loa Angeles, CA 90017
JETRO New York	Tel: 212-997-0400 Fax: 212-997-0464 www.jetro.org/newyork	1221 Avenue of the Americas, 42nd Floor New York, NY 100020-1079
JETRO San Francisco	Tel:415-392-1333 Fax: 415-788-6927 www.jetro.org/sanfrancisco	235 Pine Street, Suite 1700 San Francisco, CA 94104

Figure D-6: Japanese Associations - Food

Organization Name	Telephone/Fax URL	Address
All Japan Confectionery Assoc.	Tel: 81(0)3-3431-3115 Fax: 81(0)3-3432-1660 (n.a.)	5-14-3 Shimbashi Minato-ku, Tokyo 105-0004
All Japan Dry Noodle Assoc.	Tel: 81(0)3-3666-7900 Fax: 81(0)3-3669-7662 www.kanmen.com	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Japan Pasta Assoc.	Tel: 81(0)3-3667-4245 Fax: 81(0)3-3667-4245 www.pasta.or.jp	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Japan Spices Assoc.	Tel: 81(0)3-3940-2791 Fax: 81(0)3-3940-2790 www.ansa-spice.com	2-13-1 Nishigahara Kita-ku, Tokyo 114-0024
Chocolate & Cocoa Assoc. of Japan	Tel: 81(0)3-5777-2035 Fax: 81(0)3-3432-8852 www.chocolate-cocoa.com	JB Bldg., 6-9-5 Shimbashi Minato-ku, Tokyo 105-0004
Japan Baking Industry Assoc.	Tel: 81(0)3-3667-1976 Fax: 81(0)3-3667-2049 www.fsic.co.jp/food/pan	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
Japan Bento Manufacturers Assoc.	Tel: 81(0)3-3356-1575 Fax: 81(0)3-3356-1817 www.bentou-shinkou.or.jp	Shinichi Bldg. 10F, 2-8 Yotsuya Shinjuku-ku, Tokyo 160-0004
Japan Canners Assoc.	Tel: 81(0)3-3213-4751 Fax: 81(0)3-3211-1430 www.jca-can.or.jp	Yurakucho Denki Bldg, 1-7-1 Yurakucho Chiyoda-ku, Tokyo 100-0006
Japan Cheese Promotion Council	Tel: 81(0)3-3264-4133 Fax: 81(0)3-3264-4139 www.cheesefesta.com	1-14-7 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Dairy Industry Assoc.	Tel: 81(0)3-3261-9161 Fax: 81(0)3-3261-9175 www.jdia.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Delica Foods Manufacturers Assoc.	Tel: 81(0)3-3263-0957 Fax: 81(0)3-3263-1325 www.souzai.or.jp	Noda Bldg. 302, 10-6 Ichibancho Chiyoda-ku, Tokyo 102-0082
Japan Dry Fruits Importers Assoc.	Tel: 81(0)3-3253-1234 Fax: 81(0)3-5256-1914 (n.a.)	c/o Shoei Foods Corp. 5-7 Akihabara, Taito-ku, Tokyo 110-0066
Japan Freeze Dry Food Industry Assoc.	Tel: 81(0)3-3432-4664 Fax: 81(0)3-3459-4654 (n.a.)	c/o Nihon Shokuryo Shimbun 1-9-9 Yaesu, Chuo-ku, Tokyo 103-0028

Japan Frozen Foods Assoc.	Tel: 81(0)3-3667-6671 Fax: 81(0)3-3669-2117 www.reishokukyo.or.jp	10-6 Nihonbashi -Kobunacho Chuo-ku, Tokyo 103-0024
Japan Grain Importers Assoc.	Tel: 81(0)3-3274-0172 Fax: 81(0)3-3274-0177 (n.a.)	Mizuho Kaikan, 2-1-16 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Ham & Sausage Processors Assoc.	Tel: 81(0)3-3444-1211 Fax: 81(0)3-3441-8287 http://group.lin.go.jp/hamukumi/	1-5-6 Ebisu Shibuya-ku, Tokyo 150-0013
Japan Health Food Assoc.	Tel: 81(0)3-3268-3134 Fax: 81(0)3-3268-3136 www.health-station.com/jhnfa	2-7-27 Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Japan Honey Assoc.	Tel: 81(0)3-3297-5645 Fax: 81(0)3-3297-5646 http://group.lin.go.jp/bee/	Bajichikusan Kaikan, 2-6-16-Shinkawa, Chuo-ku Tokyo 104-0033
Japan Ice Cream Assoc.	Tel: 81(0)3-3264-3104 Fax: 81(0)3-3230-1354 www.icecream.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Fish Traders Importers Assoc.	Tel: 81(0)3-5280-2891 Fax: 81(0)3-5280-2892 www.jfta-or.jp	1-23 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054
Japan Meat Traders Assoc.	Tel: 81(0)3-3588-1665 Fax: 81(0)3-3588-0013 (n.a.)	Daini Watanabe Bldg., 1-7-3 Higashi Azabu Minato-ku, Tokyo 106-0044
Japan Potato Chips Manufacturers Assoc.	Tel: 81(0)3-3902-8877 Fax: 81(0)3-3902-9131 (n.a.)	c/o Calbee, 1-20-1 Akabane Minami Kita-ku, Tokyo 115-0044
Japan Processed Tomato Industry Assoc.	Tel: 81(0)3-3639-9666 Fax: 81(0)3-3639-9669 www.japan-tomato.or.jp	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Sauce Industry Assoc.	Tel: 81(0)3-3639-9667 Fax: 81(0)3-3639-9669 www.nippon-sauce.or.jp	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Soba Noodle Assoc.	Tel: 81(0)3-3264-3801 Fax: 81(0)3-3264-3802 (n.a.)	2-4 Kanda Jinbocho Chiyoda-ku, Tokyo 101-8420
School Meal Manufacturers Assoc.	Tel: 81(0)3-3486-3256 Fax: 81(0)3-3498-1346 (n.a.)	c/o Q.P, 1-4-13 Shibuya Shibuya-ku, Tokyo 150-0002

Figure D-7: Japanese Associations - Beverages

Organization Name	Telephone/Fax URL	Address
All Japan Coffee Assoc.	Tel: 81(0)3-5649-8377 Fax: 81(0)3-5649-8388 http://coffee.ajca.or.jp	Max Bldg., 6-2 Nihonbashi Hakozakicho Chuo-ku, Tokyo 103-0015
Brewers Association of Japan	Tel: 81(0)3-3561-8386 Fax: 81(0)3-3561-8380 www.brewers.or.jp	Showa Bldg., 2-8-18 Kyobashi Chuo-ku, Tokyo 104-0031
The Mineral Water Assoc. of Japan	Tel: 81(0)3-3350-9100 Fax: 81(0)3-3350-7960 www.minekyo.jp	Fujiwara Bldg. 5F, 2-9-17 Shinjuku-ku, Shinjuku, Tokyo 160-0022
Japan Soft Drinks Assoc.	Tel: 81(0)3-3270-7300 Fax: 81(0)3-3270-7306 www.j-sda.or.jp	3-3-3 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-0022
Japan Spirits & Liquors Makers Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 www.winery.or.jp	2-12-7, Nihonbashi Chuo-ku, Tokyo 103-0025
Japan Wine & Spirit Importers Assoc.	Tel: 81(0)3-3503-6505 Fax: 81(0)3-3503-6504 (n.a.)	1-13-5 Toranomon Minato-ku, Tokyo 105-0001

Figure D-8: Japanese Associations - Distribution

Organization Name	Telephone/Fax URL	Address
All Japan Supermarket Assoc.	Tel: 81(0)3-3207-3157 Fax: 81(0)3-3207-5277 www.super.or.jp	Okubo Fuji Bldg., 2-7-1 Okubo Shinjuku-ku, Tokyo 169-0072
Japan Chain Store Assoc.	Tel: 81(0)3-5251-4600 Fax: 81(0)3-5251-4601 www.jcsa.gr.jp	1-21-17 Toranomon Minato-ku, Tokyo 105-0001
Japan Department Store Assoc.	Tel: 81(0)3-3272-1666 Fax: 81(0)3-3281-0381 www.depart.or.jp	Yanagiya Bldg. 7F, 2-1-10 Nihonbashi Chuo-ku, Tokyo 103-0027

Japan Food Service Assoc.	Tel: 81(0)3-5403-1060 Fax: 81(0)3-5403-1065 www.jfnet.or.jp	1-29-6 Hamamatsucho Minato-ku, Tokyo 105-0013
Japan Food Service Wholesalers Assoc.	Tel: 81(0)3-5296-7723 Fax: 81(0)3-3258-6367 www.gaishokukyo.or.jp	2-16-18 Uchikanda Chiyoda-ku, Tokyo 101-0047
Japan Franchise Chain Assoc.	Tel: 81(0)3-5777-8701 Fax: 81(0)3-5777-8711 http://jfa.jfa-fc.or.jp/	Daini Akiyama Bldg., 3-6-2 Toranomon Minato-ku, Tokyo 105-0001
Japan Hotel Assoc.	Tel: 81(0)3-3279-2706 Fax: 81(0)3-3274-5375 www.j-hotel.or.jp	Shin Otemachi Bldg., 2-2-1 Otemachi Chiyoda-ku, Tokyo 100-0004
Japan Medical Food Service Assoc.	Tel: 81(0)3-3595-4281 Fax: 81(0)3-3595-4282 www.j-mk.or.jp	Araki Bldg. 2F, 1-5-7 Nagatacho Chiyoda-ku, Tokyo 100-0014
Japan Processed Foods Wholesalers Assoc.	Tel: 81(0)3-3241-6568 Fax: 81(0)3-3241-1469 (n.a.)	Edo Bldg., 2-5-11 Nihonbashi- Muromachi Chuo-ku, Tokyo 102-0022
Japan Restaurant Assoc.	Tel: 81(0)3-3571-2438 Fax: 81(0)3-3571-7090 www.joy.ne.jp/restaurant	8-10-8 Ginza Chuo-ku, Tokyo 104-0061
Japan Retailers Assoc.	Tel: 81(0)3-3283-7920 Fax: 81(0)3-3215-7698 www.japan-retail.or.jp	3-2-2 Marunouchi Chiyoda-ku, Tokyo 100-0005
Japan Self-Service Assoc.	Tel: 81(0)3-3255-4825 Fax: 81(0)3255-4826 http://www.jssa.or.jp/	Sakurai bldg. 3-19-8, Uchikanda, Chiyoda-ku Tokyo, 101-0047

Sector Reports and Further Information

The following homepages and reports can provide useful information to interested exporters.

Agricultural Trade Office's homepages
http://www.atojapan.org (English)
http://www.greatamericanfood.imfo (Japanese)

Food Processing Sector Study
A detailed look at Japan's food processing sector, identifying key trends and leading Japanese manufacturers.
http://www.fas.usda.gov/gainfiles/200301/145785214.pdf

Retail Food Sector Report
A comprehensive report on the Japanese retail food market detailing the structure, size, and areas of growth of this sector, its key industry players and prospects for various U.S. products.
http://www.fas.usda.gov/gainfiles/200008/30677668.pdf

Food and Agricultural Import Regulations and Standards (FAIRS) Report
The FAIRS report is a comprehensive guide to Japan's food and beverage regulations, standards and requirements for importation.
http://www.fas.usda.gov/gainfiles/200308/145985782.pdf

Procedures for Importing Foods and Related Products into Japan under the Food Sanitation Law
JETRO report summarizing specific technical import procedures for food products.
http://www.jetro.go.jp/se/e/standards_regulation/shokuhinyunyu-e.pdf

Red Meat Export Requirements for Japan
USDA Food Safety and Inspection Service (FSIS) summary of red meat export requirements for Japan.
http://www.fsis.usda.gov/OFO/export/japan.htm

The *National Organic Program - Export Arrangement with Japan*
USDA Agricultural Marketing Service useful information on National Organic Program and Export arrangement with Japan. Product & Market Briefs
http://www.ams.usda.gov/nop/NOP/TradeIssues/Japan.html

Japan Wine Market Annual Report
http://www.fas.usda.gov/gainfiles/200212/145784927.pdf

Pet Food Market Research on the Japanese Market
http://www.fas.usda.gov/gainfiles/200304/145885127.pdf

Japan External Trade Organization (JETRO) Reports
http://www.jetro.go.jp/ec/e/market/index.html

Other FAS Japan Reports and other information
Other Japan-specific reports are available on the USDA Foreign Agricultural Service Website.
http://www.fas.usda.gov/scriptsw/attacherep/default.asp